VIRTUAL TEAM WORK

MAKING COOPERATION WORK IN LEONARDO DA VINCI PROJECTS

information, theory and practical tips
# Contents

## PREFACE 5

## SECTION 1 | INTRODUCTION TO VIRTUAL TEAMS 7
- Virtual Teams – Crossing Time and Space 7
- Differences between Virtual and Traditional Virtual teams 7
- The Virtual Teams Handbook 8
- Tools by Chapter 9

## SECTION 2 | DEVELOPING A TEAM CHARTER 11
- Tool: Defining the Scope 13
- Tool: Values & Guiding Principles 17

## SECTION 3 | BUILDING TRUST AMONG TEAM MEMBERS 19
- Tool: Team Member Skills Profile 21
- Tool: Check Your Baggage Here 23
- Tool: Shared Commitments Statement 25

## SECTION 4 | MANAGING DIVERSITY 27
- Tool: Differences Dialogue 29
- Tool: Values Priority Comparison 33
- Tool: Feedback Circle 39
- Tool: Team Engagement Diagram 41

## SECTION 5 | MANAGING TEAM MEMBER CONFLICT 45
- Tool: Confrontation Comfort Zone Self Check 51
- Tool: Advocacy/Inquiry Matrix 57

## SECTION 6 | MAKING TEAM MEETINGS WORK 65
- Tool: Team Meeting Effectiveness 69

## SECTION 7 | MAKING TEAM DECISIONS 73
- Tool: Reaching Consensus 75
- Tool: Flowcharting 77
- Tool: Cause-and-Effect Diagrams 79
- Tool: Tree Diagram 81
- Tool: Solution Matrix 85
- Tool: Selection Matrix 87
SECTION 8 | PLANNING TECHNOLOGY USE
• Guidelines for Telephone Use 92
• Guidelines for E-mail Use 92
• Guidelines for Teleconferencing 93
• Collaborative Team Software 94

SECTION 9 | IMPLEMENTING TEAM RESULTS
• Tool: Stakeholder Analysis Matrix 97
• Tool: Stakeholder Resistance/Response Matrix 99
• Tool: Process Decision Program Chart (PDPC) 105

SECTION 10 | DEVELOPING AND ASSESSING
• Tool: A-B-C (Antecedents—Behaviours—Consequences) Diagnosis 111
• Tool: Barriers and Aids Analysis 115
• Tool: Team History Timeline 117
Preface

“In just two years, our team of roughly 15 people collaborated to develop a high quality educational program in a very short time. Our effort spanned more than six countries and languages. Most of us came from different companies, universities and institutions, and there were a score of more specific functional, managerial, or other specialities. Our team relied on technology-mediated communications rather than face-to-face interaction to accomplish their tasks. Different cultures, countries, and languages; different companies, work sites, communication technologies, and skill-sets; plus different processes and hierarchical levels – we all collaborated within the integrating construct of a commonly shared goal”. | A project leader describing a Leonardo da Vinci European Co-operation Project.

The Leonardo da Vinci European Union action programme encourages cooperation between organisations involved in vocational training, aiming to improve the quality of training provision, develop the skills and mobility of the workforce, stimulate innovation and enhance the competitiveness of European industry. It funds international project virtual teams to develop innovative education and training products for vocational education.

Project virtual teams are a valuable vehicle for European Leonardo da Vinci Co-operation Projects, helping to build international co-operation, dialogue and innovation. These project virtual teams often bring people from a variety of disciplines, functions, countries and organisations together to work on a particular education-related project.

Working in those diverse virtual teams is difficult, demanding, and not always successful. At the Dutch National Agency for Leonardo da Vinci, we often meet groups of people calling themselves virtual teams that in fact lack the fundamental ingredients of effective team performance or behaviour. Such groups tend to divide the work into duties and distribute the duties to individual group members; indeed, they may have only met a couple of times before their various results are combined into a document, presentation or training programme that allows each person’s “part” to stand alone.

Yet there is much more involved in being a team than simply sharing a common output. Virtual teams require integration, creativity, process management, conflict resolution, and both qualitative and quantitative problem-solving tools. They require rigorous team thinking, and the ability to merge thinking from different disciplines to generate a collaborative process and a collaborative product. Project virtual teams at Leonardo have multiple purposes: a viable product or output (e.g. a research paper, training curriculum or report), building respect for differences (e.g. functional, gender, racial or ideological), and the ability to resolve problems through attaining a broad consensus. Achieving these capabilities requires much more facilitation, feedback and nurturing than the effort involved in establishing a mere group.

This handbook presents tools and processes that project leaders and members can use right now, whilst working on a Leonardo project. However, the contents will also prepare people for the world beyond their Leonardo project, providing them with skills that they can use repeatedly as they pursue their life’s work. The purpose of this handbook is to assist project managers who are working in Leonardo virtual teams to learn and choose useful tools for making virtual teams effective – both in terms of process, and in outcomes.
VIRTUAL TEAMS – CROSSING TIME AND SPACE

Not only are more people working in virtual teams today, but issues such as growing globalisation, the spread of technology, and falling travel costs have created the possibility of forming virtual teams in which the membership is not co-located; that is to say, the team members are not based in one location but spread around the world. These virtual teams are often referred to as virtual teams. A virtual team is a group of people who work interdependently across space, time, cultures, and organisational boundaries on temporary projects with a shared purpose, while using technology (Lipnack and Stamps, 1997).

Virtual teams have evolved as an approach to make it possible for individuals to work together without spending time face-to-face. Beyond the benefits of a traditional, face-to-face team, the successful use of virtual teams can also provide organisations with significant savings in terms of the travel time and other costs associated with face-to-face meetings. They have the potential to provide more flexibility and responsiveness, and better resource utilisation for the organization.

Virtual team members may be located in different parts of a city or different parts of the world. They may be a part of the same or different organisations. The team can be formed to complete a project that may take a few weeks, a few months, or a year or more. The use of virtual teams is particularly appropriate in Leonardo da Vinci project virtual teams that rely on people who work and live in different parts of Europe.

DIFFERENCES BETWEEN VIRTUAL AND TRADITIONAL VIRTUAL TEAMS

Recognising the difference between virtual and traditional virtual teams is important because understanding and dealing with the differences may be the key to your virtual team’s success. Several themes reflecting the differences between virtual teams and face-to-face virtual teams must be addressed.

First virtual teams must create their own operating structure. They have a stronger need to share a clear purpose than face-to-face virtual teams. Virtual teams that operate outside the traditional boundaries of an organisation and its bureaucratic rules need to have their own strong common purpose to stay in tune. It is not uncommon for virtual teams to have a vision, a mission and a charter. Indeed, the best predictor of virtual team success is often the clarity of its purpose and the participatory process by which the team achieves this.

The importance of clarifying the team’s purpose is not unique to virtual teams, but the depth and clarity of the purpose does differentiate virtual from traditional virtual teams. Creating a well-defined, clear, cohesive and lasting purpose is a challenge for traditional virtual teams, and is even more difficult when work must be carried out across the boundaries of time, space and organisations. However, it is crucial to the team’s ultimate success.
Second, the nature of virtual team interaction and leadership also varies from that in traditional virtual teams. Since virtual teams work in a non-hierarchical environment, forms of interaction, communication and decision-making are more decentralised than those in face-to–face virtual teams. Nonetheless, leadership may be required to get a project completed, and in order to deal with the social issues that can present themselves when there is a limited amount of interaction. With face-to-face virtual teams it is easy to clarify points or misunderstandings by informal contact ‘at the water cooler’. Virtual interactions, however, may produce more uncertainties, and it is important to develop a process for resolving these.

Finally, there is a vital need to build trust and connectivity between members whose relationships are mostly electronic and often not in real time. Building strong bonds of trust provides the glue that can hold a team together. Trust is important in all types of virtual teams, but even more important in virtual teams. Virtual teams with mutual trust converge more easily, organise their work more quickly, and manage themselves better. At the same time, trust is both harder to attain and easier to lose without face-to-face contact. Thus, for many reasons, the ability to develop mutual trust is a necessary condition for virtual team success.

THE VIRTUAL TEAM HANDBOOK

The following sections illustrate tools, techniques, and processes that can help virtual team leaders function more effectively both in managing people in virtual teams and in managing the tasks to be accomplished by virtual teams. Section 2 provides essential and supplemental guidance on how to define the team’s task, how to help team members find common ground, and how to get started developing a team charter. Section 3 focuses on concepts and activities that can help team members manage their relationships toward building trust and using the talents of all members to progress toward task accomplishment. Section 4 addresses ways to harness the diverse thinking and experience of team individuals toward inclusive team processes which engage all members of the team toward goal accomplishment. Section 5 focuses on the possible conflict among team members, ways to frame solutions to conflict, and process tools which allow team members to resolve conflicts over task and personalities. Section 6 addresses the skill of conducting successful virtual team meetings. Section 7 addresses various ways of framing data and information so that virtual teams can make effective decisions. Section 8 addresses some of the particular challenges and advantages of using technology to support the work of virtual teams. Section 9 offers guidance on presenting team decisions, results, or products and clarifies how virtual teams might implement their results. Section 10 discusses concepts and methods for assessing team performance, provides models and tools for use in assessing teamwork, and suggests ways of developing team performance.

To help the reader quickly identify which activities might be used in which circumstances, the following chart frames each activity described in the book, explains briefly the purpose of the activity, and suggests the typical time needed to complete the activity as well as the common team project task where the activity is usually helpful.
<table>
<thead>
<tr>
<th>Ch.</th>
<th>Tool/Activity</th>
<th>Purpose</th>
<th>Time</th>
<th>Task</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>Defining the Scope</td>
<td>Defines the scope of a project</td>
<td>45–60</td>
<td>Launch</td>
</tr>
<tr>
<td>2</td>
<td>Values &amp; Guiding Principles</td>
<td>Determine the Team’s Guiding Principles</td>
<td>45–60</td>
<td>Launch</td>
</tr>
<tr>
<td>3</td>
<td>Team Member Skills Profile</td>
<td>Helps members articulate their particular task and process skills to that their team members can understand their talents</td>
<td>20–30</td>
<td>Team Dynamics</td>
</tr>
<tr>
<td>3</td>
<td>Check Your Baggage Here</td>
<td>Identify negative personal and organisational history which must be overcome before the team can succeed.</td>
<td>45–60</td>
<td>Launch</td>
</tr>
<tr>
<td>3</td>
<td>Shared Commitments Statement</td>
<td>Establishes an ethical commitment to shared values, behaviours and attitudes</td>
<td>45–60</td>
<td>Launch</td>
</tr>
<tr>
<td>4</td>
<td>Differences Dialogue</td>
<td>Recognizes and openly addresses team member assumptions about each other</td>
<td>25–30</td>
<td>Team Dynamics</td>
</tr>
<tr>
<td>4</td>
<td>Values Priority Comparison</td>
<td>Understand and compare personal and team value</td>
<td>20–30</td>
<td>Team Dynamics</td>
</tr>
<tr>
<td>4</td>
<td>Feedback Circle</td>
<td>Assures that each member contributes and is heard</td>
<td>30–45</td>
<td>Team Dynamics</td>
</tr>
<tr>
<td>4</td>
<td>Team Engagement Diagram</td>
<td>To be able to objectively visualize the communication pattern of a team at work</td>
<td>30–40</td>
<td>Team Dynamics</td>
</tr>
<tr>
<td>5</td>
<td>Confrontation Comfort Zone</td>
<td>Helping team members understand their readiness to raise issues of conflict</td>
<td>20–30</td>
<td>Conflict</td>
</tr>
<tr>
<td>5</td>
<td>Advocacy/Inquiry Matrix</td>
<td>Understanding team member positions and reasons for their thinking</td>
<td>30–45</td>
<td>Conflict</td>
</tr>
<tr>
<td>6</td>
<td>Meeting Effectiveness Evaluation Tool</td>
<td>Assess the overall quality of process and product</td>
<td>10–15</td>
<td>Evaluating</td>
</tr>
<tr>
<td>7</td>
<td>Reaching Consensus</td>
<td>Process designed to help team reach consensus</td>
<td>30–45</td>
<td>Deciding</td>
</tr>
<tr>
<td>7</td>
<td>Flowchart</td>
<td>Provide a pictorial representation of the problem</td>
<td>30–45</td>
<td>Understanding</td>
</tr>
<tr>
<td>7</td>
<td>Cause-Effect diagram</td>
<td>Determine possible problem causes</td>
<td>45–60</td>
<td>Analyzing</td>
</tr>
<tr>
<td>7</td>
<td>Tree diagram</td>
<td>Provides a visual representation of complex situations</td>
<td>45–60</td>
<td>Analyzing</td>
</tr>
<tr>
<td>7</td>
<td>Solution Matrix</td>
<td>Qualitative structure for decision making</td>
<td>30–45</td>
<td>Deciding</td>
</tr>
<tr>
<td>7</td>
<td>Selection Matrix</td>
<td>Provides weights to decision making criteria</td>
<td>60–75</td>
<td>Deciding</td>
</tr>
<tr>
<td>Ch.</td>
<td>Tool/Activity</td>
<td>Purpose</td>
<td>Time</td>
<td>Task</td>
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<tr>
<td>8</td>
<td>Guidelines for Telephone Use</td>
<td>Provides guidelines for telephone use</td>
<td>10-15</td>
<td>Understanding</td>
</tr>
<tr>
<td>8</td>
<td>Guidelines for E-mail Use</td>
<td>Provides guidelines for E-mail use</td>
<td>10-15</td>
<td>Understanding</td>
</tr>
<tr>
<td>8</td>
<td>Guidelines for Teleconferencing</td>
<td>Provides guidelines for teleconferencing</td>
<td>10-15</td>
<td>Understanding</td>
</tr>
<tr>
<td>8</td>
<td>Guidelines for Team Software</td>
<td>Provides guidelines for team software</td>
<td>10-15</td>
<td>Understanding</td>
</tr>
<tr>
<td>9</td>
<td>Stakeholder Analysis</td>
<td>Determines the level of support of key stakeholders</td>
<td>45-60</td>
<td>Implementation</td>
</tr>
<tr>
<td>9</td>
<td>Stakeholder Resistance/Response Matrix</td>
<td>Deals with the concerns/resistance of stakeholders</td>
<td>45-60</td>
<td>Implementation</td>
</tr>
<tr>
<td>9</td>
<td>Process Decision Program Chart.</td>
<td>Implementation planning tool to address contingences for potential problems</td>
<td>45-60</td>
<td>Implementation</td>
</tr>
<tr>
<td>10</td>
<td>A-B-C Diagnosis</td>
<td>Identifies the Antecedents, Behaviors and Consequences surrounding a team's problem.</td>
<td>30-45</td>
<td>Changing</td>
</tr>
<tr>
<td>10</td>
<td>Barriers and Aids Analysis-Diagnosis</td>
<td>Form to assist in identifying the factors that block team effectiveness</td>
<td>30-45</td>
<td>Changing</td>
</tr>
<tr>
<td>10</td>
<td>Team History Timeline</td>
<td>Visual tool to capture the key team events</td>
<td>20-25</td>
<td>Changing</td>
</tr>
</tbody>
</table>
A team charter is a broad document completed by the team that deals with many important aspects including:
the purpose or reason the team is necessary, how the team will operate, what customers they are serving, what
ground rules they need to establish and what their specific goals or objectives will be. The team charter sets
forth the overall mandate of the team and the performance results the team is expected to accomplish.

The team charter is a significant first step to ensure the team will be successful. Perhaps the most important
benefit is the alignment of the charge, or purpose, of the team with the objectives of the organisation. The
charter helps the organisation and the team to validate the importance of the project.

A well-developed charter will accomplish several necessary steps. It will:

• Clarify why the team has been formed and what it is supposed to do.
• Ensure what the team has been asked to do is necessary and that its goals are in line with the organisational
  vision.
• Define the playing field for the team, specifying the tasks, roles and responsibilities the team will undertake.
• Provide a basis for determining team success.

Each of the major components of the charter will be discussed and examples will be provided.

**TEAM PURPOSE OR MISSION**

The team purpose statement identifies what the team is supposed to do and why. It defines how your team will
succeed and helps to establish what the team’s work really is and what it is not. When you know the team’s
purpose you can easily understand the work you will do and how it relates to what the organisation is doing. It
is also easier for discussing your work and focussing your thinking and creativity.

A common problem is to determine what a part of the task to be completed is and what is not a part of the
task. One approach to this is to have the team clarify what actually defines the purpose of the team. The
following activity can be used.
**Tool | Defining the Scope**

**Materials Required:**
One large sheet of paper and post-it notes

**What is it?**
It is a process used by virtual teams to help clarify their mission and to determine the boundaries of their project.

**Why is it used?**
- To help a team better understand exactly what it is expected to do.
- To determine what is and what is not a part of the project.

**When is it used?**
It is used in conjunction with their charge to more sharply define their mission.

**How is it used?**
- The team leader attaches a large sheet of paper to the wall and divides the sheet into three columns labelled “IN”, “OUT”, and “?”.  
  - The team reviews what it has been asked to do and then each member identifies activities on a post-it note that he/she believes fits into each of the categories. For the “IN” category, each member identifies the activities each believes is inside the scope of the project. For the “OUT” category, each person identifies those related activities that fall outside the scope of the project. For the “?” category each person identifies activities that they are uncertain about in terms of being in or outside the scope of the project. The post-its are posted in the appropriate category.
  - As the members post their activities, they are checked for duplication and for ideas that appear in more than one column. Duplicates appearing in the same column are removed while duplicates that appear in different columns are moved to the “?” column.
  - All activities are reviewed by the facilitator with the goal of forming only two lists, those that are a part of “IN” the scope, and those that are “OUT” of the scope of this project. The facilitator determines where those items in the “?” column belong. When all of the items have been placed in one of two slots the process has been completed.
KEY CUSTOMERS AND THEIR REQUIREMENTS

In the workplace, what the team does will have an impact upon people within and outside the organisation. Often implementation issues depend upon keeping key stakeholders informed of the work of your team. Thus, it is important to determine

- Which departments and individuals will the virtual teams’ work affect and what are their needs?
- What are the customer’s expectations, in other words, what is required to satisfy the customer?
- What are the needs and concerns of the stakeholders?

It is a good idea to identify as many different customers and stakeholders as possible and then prioritise them according to importance.

TEAM GOALS AND OBJECTIVES

The team goals or objectives provide clear direction in terms of what the team expects to accomplish. The goals should reflect the successful accomplishment of the purpose and should reflect team goals about the characteristics or quality of the output product and operational process of the team. The goals must be done collectively and should be goals that are shared by all members of the team. The goals should reflect

- How they wish to complete the project
- What they wish to accomplish as a team.

Other issues related include the time frame that must be met, what the performance measures are, and the performance outputs that the team will need to meet before its work is complete.

ROLES AND RESPONSIBILITIES

Once the goals have been defined, team members are now ready to identify those areas for which he/she can make the best contribution.

GUIDING PRINCIPLES

Some people describe the processes that a team uses as its brain, its work outputs as its hands and feet and its values as its heart. Values are the beliefs and moral and ethical principles that guide a team’s behaviours (McDermott, Brawley, & Waite, 1998). The values reflect what individual team members believe is the set of
behaviours or code of conduct under which they personally would want to operate. These values shape the guiding principles that define how a team will operate.

Developing trust is especially important for newly formed virtual teams and one way to enhance and develop trust occurs when each member of the team consistently acts within the boundaries of what the team perceives as accepted behaviour. Thus, it is extremely important to discuss and develop the values and behaviours that the team agrees with.

Values that a team selects typically address issues such as respect, promptness, common courtesy, and honesty. Virtual teams may also focus on issues such as innovation or creativity, achievement, co-operation and commitment to completing the mission. Thus, guiding principles need to provide the specifics of how a team will operate.

Specifically, a team should consider the following:

- Identification of the values they each share and the guiding principles they will use to work together as a team.

- Establishing the specific ground rules that will shape how a team will function and how each member will function. The areas will normally include decision making, participation, perspective, communication, confidentiality, meeting ground rules, plus meeting and individual feedback.

- Determining how the team will handle anyone who consistently ignores the ground rule and what actions will be taken.

To assist virtual teams in developing their guiding principles it is useful to carefully consider the individual values of the members and then, based upon these values, develop team values which are then made operational as the team’s guiding principles. The following activity assists in this process.
WHAT IS IT?
A process designed to identify operating principles, which will support and sustain the values that will guide the team.

WHY IS IT USED?
It is used to help a team identify what each member values and to translate those values into operating or guiding principles that will shape the processes and procedures the team will use.
It is used to avoid problems the team may have at a later point.

WHEN IS IT USED?
It is used during the process of developing a team charter and forming guiding principles the team will use to accomplish its goals.

HOW IS IT USED?
- Each person selects at least three values that are personally important to him or her. Examples might be honesty, promptness, achievement, and respect.
- All members of the team share their values and discuss the relative importance of each value to them.
- After all the values have been discussed the team selects a value they all agree is important and incorporates the value as an operating or guiding principle. For example, if the team values promptness, an operating principle might be that all work assigned to individual members must be completed and distributed to other team members 24 hours before the target date.
- Another value is selected and the process of converting a value into an operating principle continues until all values having unanimous support have been discussed.

Once all of the aspects of the charter have been discussed, the team completes a form similar to the one shown on the following page. Each member signs the charter and agrees to operate within the framework defined by the charter. This document is shared with the project co-ordinator and is carefully reviewed. If everyone agrees with the document then the team knows that it is on target. A plan is now in place that defines what you will do, how you will do it and when it will be done.
TEAM CHARTER WORKSHEET

Note: This worksheet should be completed with all members of the team present and after everyone understands the team project assignment.

PURPOSE OR MISSION:
One of the major reasons you are doing this project is to fulfil a part of the course requirement. The reason a team is used is because the final product will be improved by working as a team and also to provide the opportunity for you to practice and enhance your team skills.

KEY CUSTOMERS:
May include any organisation with which you are working with.

GUIDING PRINCIPLES:
What are our expectations concerning individual and team behaviour? How will we make decisions?

GOALS/OBJECTIVES:
What are our major objectives for the project? What are our objectives for team development? What products/services will we produce? What level of performance will we strive to meet? What are the goals of the team?

I agree to support and adhere to the above statements. (Sign and return to your instructor)
Building Trust among Team Members

Trust is a confident belief in the honesty, reliability, integrity, unselfishness, and genuineness of another person or thing. Two components of trust are ‘being trusting’ (fair, respectful, supportive, and objective) and ‘being trustworthy’ (dependable, genuine, unselfish, and predictable). Trust is the key to maintaining effective relationships. It may take a very long time to earn trust, but it can be lost by just one act that violates the standards of the relationship.

When virtual teams are formed for work tasks in organisations or projects, the goal is usually to get some task done more effectively – better quality, better responses from customers, and more efficient work process, better learning. So, the goal is not to make people feel good but rather to enhance performance. If the reason for team formation is productivity, then why worry about something so deeply personal as trust?

Several reasons for taking time to focus on trust include:

- People who trust each other are more likely to give honest opinions.
- People who trust each other are more likely to withhold pre-judgement when ideas are unusual.
- People who trust each other are more likely to look for solutions rather than blame when actions don’t work out.
- People who trust each other are more likely to share the workload and help each other out when parts of the task become burdensome.
- People who trust each other are more open to change.

How then can trust be developed from the beginning of a project and maintained throughout?

Trust is not an automatic result of having a common goal. Therefore, choosing the right team members for the task (based on task skills, team process skills, and learning goals for the project) is a necessary, but not sufficient, step in the start-up stage. Some simple practices can increase the pace at which trust is developed and can set a tone for urgency and patience in task accomplishment. Urgency that a task must maintain enough momentum and energy to drive through to completion, and patience to know when to pause to take stock or re-start a phase of the project.

Some simple trust-building tools that can be used at the team start-up:

- Before the first team meeting, all team members should be asked to think seriously about what they bring to the team and what they want from the team. They should be asked to think about what the goals or outputs of the team project ought to be and what their personal interest in those goals might be. For example, personal goals might be a quality product of which they can be proud, an early completion of the task, or a large number of new products developed. They should also be asked to think about what makes a team work
well for them – fair treatment, everyone involved in the work, all members arriving on time, meetings that end on time, ways to check for shared understanding.

- The first team meeting should mention the team’s charge and constraints (time, budget, work-space, etc.); however, a greater percentage of the meeting time should be specifically focused on getting to know each other’s skills, experience, and personal goals for the project. When the team members are new acquaintances, the get-acquainted session should be longer, typically, than when the team members know each other well. No person is completely altruistic, so recognising that all team members have both organisational goals, which benefit the firm or group, and personal goals, which further the individuals’ careers or learning, is an essential understanding. This meeting is part of the getting-started process and will eventually lead to the completion of the team charter. However, the team charter is not the goal of the first meeting. Instead, building mutual respect and finding common ground is the goal of the first meeting.

- The team leader should carefully facilitate the pace of the first meeting. Asking each team member to come to the meeting with three personal goals and three organisational goals will help jump-start the sharing process. The team facilitator should ask each team member about personal goals first. After the goals have been presented, the facilitator should then record the organisational goals. The facilitator can be a designated or elected team leader, or the facilitator role can be rotated among the team members so that all members gain experience in running the meeting process.

- Encourage the team to start the team charter process with norms developed by the team members (as discussed in Section 2).

**TRUST BUILDING STARTER ACTIVITIES**

The following three examples are tools which can be used to start the process of building trust from the very first meetings of the team. These activities focus on trust building but make it a significant part of the readiness for task accomplishment.
TOOL | TEAM MEMBER SKILLS PROFILE

WHAT IS IT?
The team member skills profile is a self-assessment tool that helps virtual team members document their skills so that other team members may more quickly get to know their interests, accomplishments, and team-relevant skills.

WHEN IS IT USED?
The profile can be used early in the team’s development when virtual teams are forming and members are trying to get to know each other quickly. It can also be used at later phases of the team’s development as the team members’ shift from one type of task (generating ideas) to planning the work, dividing the duties, and planning the report or presentation.

WHY IS IT USED?
- It helps members share their skills without bragging.
- It allows team members to understand each other and begin to use their talents well.
- It can help build trust by building commitment of members to apply their skills to the team’s work.
- It allows the team to work on the task while also emphasising individual abilities.
- It allows team members to include their list of new skills they would like to learn.

HOW IS IT USED?
Each team member is given a blank skills profile sheet in Table 4.1 and asked to complete fill in the spaces according to their personal competencies. The members can complete the sheet before a meeting, at the beginning of the team’s forming process, or at a meeting. Regardless of when the sheet is completed, time should be made available specifically during a team meeting so that each team member can be given 3 to 5 minutes to explain their skills and answer questions about those skills.
# TEAM MEMBER SKILLS PROFILE

Identify your actual competencies, things you can do well which may be of value to the team.

<table>
<thead>
<tr>
<th>WHAT TECHNICAL SKILLS HAVE YOU ATTAINED</th>
</tr>
</thead>
<tbody>
<tr>
<td>(i.e. computer software, groupware, videography, mapping, mechanical, special equipment)?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>WHAT CREATIVITY SKILLS DO YOU POSSESS</th>
</tr>
</thead>
<tbody>
<tr>
<td>(i.e. drawing, photography, music, acting, design)?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>WHAT COMMUNICATION SKILLS DO YOU POSSESS</th>
</tr>
</thead>
<tbody>
<tr>
<td>(i.e. writing ability, speaking, debate or argumentation, persuasion, listening, paraphrasing)?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>WHAT ORGANISATIONAL SKILLS DO YOU POSSESS</th>
</tr>
</thead>
<tbody>
<tr>
<td>(i.e. time management, scheduling others, multi-tasking, logistics)?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>WHAT TEAM PROCESS SKILLS HAVE YOU ACQUIRED</th>
</tr>
</thead>
<tbody>
<tr>
<td>(i.e. running meetings, record-keeping, team-building, conflict management, mediation, facilitating discussions)?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>WHAT OTHER SKILLS DO YOU HAVE THAT MIGHT BE OF INTEREST OR VALUE TO THE TEAM</th>
</tr>
</thead>
<tbody>
<tr>
<td>(good memory, head for numbers, speed-reading or knowledge of relevant content areas)?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>WHAT NEW SKILLS ARE YOU HOPING TO GAIN?</th>
</tr>
</thead>
<tbody>
<tr>
<td>What new learning interests you? What team skills can you develop on this team that will help you in your future career or life?</td>
</tr>
</tbody>
</table>
**Tool | Check Your Baggage Here**

**What is it?**
The ‘check your baggage here’ tool is a tool for identifying negative personal and organisational history which must be overcome before the team can succeed. It identifies organisational history that could affect team performance and personal history that could affect individual attitude and performance.

**Why is it used?**
- It recognises that every team project must begin with a clean slate.
- It provides a structure for identifying old ideas that could reduce team and personal effectiveness.
- It provides a framework for individual and team commitment to eliminating negative baggage.

**When is it used?**
- It is used to aid a new team by eliminating old concerns.
- It is used to provide a realistic understanding of the impact organisational and personal history can have on individual and team performance.
- It is used when team members need to identify their biases.
- It is used to eliminate attitudinal and organisational obstacles.

**How is it used?**

**Materials:** Several post-it notes for each person and one sheet of flip chart paper for the group.

**Instructions:** On separate post-it notes, write down any old grudges, resentments, problems that you think you need to jettison so that you can be successful in this team. (Individuals can do this part of the tool before the meeting, if the facilitator wishes.) One issue should be recorded per post-it.
ANSWER EACH OF THE FOLLOWING TWO QUESTIONS:

- What baggage does your organisation need to check?
  (For example, status differences between classifications of workers, remembering nostalgic but antiquated methods, etc.)

- What personal baggage do you need to check?
  (For example, resentment of past treatment by members or organisation, desire to float on previous successes, etc.)

**NOTE:** The facilitator may give a personal example as a starter idea. One possibility: “I need to jettison scepticism about change processes.” The honesty of the facilitator may serve to build trust and comfort level among team members who might otherwise hesitate to self-disclose such concerns.

**Process for sharing:** Have volunteers read their answers aloud and post their notes on the flip chart. Discuss the issues. Ask for commitments to take personal responsibility of the personal baggage. As facilitator, offer help with eliminating those organisational bags that can be managed differently.

Save the flip chart information and revisit the notes in a few days, weeks, or months to see if the team is flying along unhindered or if the team has carried along unwanted baggage that slows the flight or threatens to crash the process.
TOOL | SHARED COMMITMENTS STATEMENT

WHAT IS IT?
A shared commitments statement is a tool, collectively developed by team members, which establishes an ethical commitment to shared values, behaviours and attitudes.

WHY IS IT USED?
It forces team members to identify personal and team commitments that they will use to self-monitor individual behaviour and team shared values. The statement establishes the range of acceptable and unacceptable behaviours on which the team agrees.

WHEN IS IT USED?
- When a team is preparing to develop a set of norms or behaviours that support the goals.
- When a team is first meeting, to understand the range of acceptable team behaviours each member values.
- When a team leader is trying to help members establish common ground and learn how to work together.

HOW IS IT USED?

Materials: Flip chart paper.

Instructions: Before the first team meeting, frame the following questions to the team members (a collective e-mail or memo may be sufficient to communicate the assignment). Ask each team member to bring their answers to the first meeting and to be prepared to discuss their reasons for their answers. Ask respondents to provide 3 examples for each question and to answer in bullets (5 words or less per example).

- What behaviours do you value in other team members?
- What behaviours do you value in yourself?
- What behaviours do you dislike in team members?
- What commitments do you make to other team members to assure fair, productive personal responsibility for team performance?
At the first meeting, allow everyone to share answers to each of the 4 questions. Allowing each person to share one item at a time in ‘round-robin’ fashion keeps everyone involved and sets the standard for shared responsibility in shaping the team’s process. Record the bullets on flip chart paper so that all team members may see the answers. Use multi-voting methods or structured discussion (using round-robin discussion or setting time limits for each member to talk) to prioritise the top 5 to 10 commitments that are shared by the group. Develop a list of shared commitments. A volunteer can polish the wording for reconsideration at the next meeting. ‘Publish’ the final list by providing every team member with a copy, and refer to the list occasionally to check everyone’s views of whether or not the team is meeting its shared commitments.

**EXAMPLE:**

Sample Shared Commitments List:

- I will listen to each team member’s contributions and feedback.
- I will offer honest and direct criticism, not sugar coated nods and approvals.
- I will look for both the good and the weak in team member’s suggestions.
- I will complete my role assignments on time and thoroughly.
- I will address problems with individual teammates privately to solve them privately and not infect the team.
- I will enter each meeting with an open mind.
- I will receive feedback (both affirmative and negative) with an eye toward overall improvement of the team.
For most virtual teams to be effective, some degree of diversity is both desirable and necessary. If all the team members have the same perspectives, histories, work experience, academic training, and models of problem solving, then, theoretically, the creativity and problem solving potential of the team is limited. The most urgent reason for having virtual teams make decisions, create new products, or solve problems is because we need a more effective outcome than one person can offer, or we need an outcome that represents the synergy of multiple points of view. When facilitated properly, a team will be more effective than a single person will. For example, virtual teams that develop new product ideas are often composed deliberately of people of various ages, interests, religious backgrounds, or academic disciplines. Similarly, virtual teams which are attempting to reduce the cost of making a particular product often have members from the department which makes the product, the customer service department, the accountancy department, the supplier company which makes the raw materials, and often a customer who uses the product. The goal of team member diversity is to offer ideas that are more creative and enhance the thinking or problem solving of the team. The latent power of diverse membership is dramatic if time and attention are devoted to helping that teamwork through and with those differences toward shared team goals.

While a diverse team can generate a wider array of ideas, solutions, perspectives, product lines, customer uses, or dissemination campaigns, a diverse team may also require special management to both release and harness that diverse energy. Just as a diverse team may have more collective talent, that collection of differences can take longer to meld into a team and can face more conflicts if that talent is not facilitated with insight to the idiosyncrasies of the team membership.

SPECIAL TEAM BUILDING ISSUES

This section addresses special team-building issues, which can arise when team members are dramatically different. Recent views of diversity have tended to address differences among people from different religions, races, sexes or sexual orientations, ethnicities, countries, socio-economic backgrounds, or physical abilities. Indeed, any of these differences may lead to unique opportunities and challenges for team building. The author here cautions the reader, however, not to limit one’s understanding or framing of diversity to those typically named categories. In fact, differences in thinking across functional areas of business (for example, between R&D functions and operation functions; between human resources specialists and financial management strategists) within the same firm may be a significant source of diversity. Similarly, individuals who have studied problem solving from a financial perspective may approach it in a strikingly different way than an individual who has studied it from a process improvement perspective or a team-building perspective. Therefore, taking the time to help team members raise their awareness about their different perspectives and then helping them find a collaborative model for making decisions, operating their meetings, and resolving conflicts is essential in any team – even those which may, on the surface, appear to be very cohesive. Most diversity leads to differences in thinking and behaviour – it is these thinking and behaving differences that need attention when building effective virtual teams.
The tools in this section are probably useful for any team, even ones that may not appear to be very diverse. They should be particularly useful to virtual teams that have members whose personal backgrounds, education, and work experience may generate great differences in how members typically think and act. The tools here, then, attempt to identify differences and help members value those differences through processes that find common ground toward cohesive action and goal accomplishment.
WHAT IS IT?
The “differences dialogue” tool is a tool for recognising and openly addressing team member assumptions about each other. It fosters honesty about possible assumptions and misgivings and helps members start to build trust.

WHY IS IT USED?
- To head off potential conflict in virtual teams composed of members with very different backgrounds: roles, ethnicities, ages, countries, cultures, and other differences.
- To use the differences and perspectives to identify a baseline from which to build common ground.
- To model dialogue that promotes honesty and builds trust.

WHEN IS IT USED?
- It is used when the team is being formed to bring the potential differences out into the open.
- It is used to start an on-going dialogue among members that can lead to greater cohesiveness and trust.
- It is used to move the focus of the team from their differences to their commonalities, particularly their team goal and team norms.

HOW IS IT USED?
Materials: Post-it notes or index cards. Markers.

Who Facilitates: This tool is best lead by a facilitator who is not a member of the team. For example, the team’s sponsor or assigned team leader may conduct the tool and facilitate the discussion.

Instructions: The team members are asked to sit in a circle, such as around a conference table. The facilitator identifies the team members by name and any organisational affiliation that may reveal an expertise. After the facilitator identifies each team member, the process for identifying differences begins.

The facilitator asks each member to silently look at each other team member for a few seconds. After all members have completed the silent observation and spent equal amount of time on each member, the facilitator provides the following instructions:

Now that you have met the members of the team and had a chance to make an initial impression, think about how you are most different from other team members. The difference can be anything that may become relevant in the team’s decision-making or process as the team engages in completion of the project. Think about as many things as you can generate that make you most different from the rest of the team.

On the post-it (or index cards) write each separate difference you identified which makes you most different from the other team members. Try to make your point in 5 words or less (Ex. “Oldest team member,” “Only...
woman on the team,” “Only member from the discipline of marketing”) Record each separate thing on a separate post-it (card). Do not put your name on the post-it; but write large enough that a person could read the content of the note from 3 feet away.

When each team member has identified at least 5 things, the facilitator will take the notes and randomly place them on a white board, smooth wall, or chalkboard, being careful to mix up the cards from different members.

The facilitator then asks the team members to come and read the notes together silently and to make sure that they read all the notes.

After having carefully read each post-it, team members are asked to return to their circle and sit down.

**Process for dialogue:** The facilitator asks team members to address their observations about the “differences” posted. Some questions to generate dialogue are:

- What surprises you most about the types of differences?
- Were there any differences which seemed similar
- When you see the range of differences that you assume exist among you, do you have any concerns?
- Do the range of differences help you prepare for the kinds of difficulties you might have communicating, making choices, or managing your meeting times?
- Does knowing the differences that you perceive about yourself as well as those that others perceive about themselves make you think differently about how the team may want to operate?
- As the team begins the planning of the team charter, which identifies the shared team goals and shared team norms, what kinds of additions should the team make in order to be more respectful of all of these differences?
- What actions should this team take at the beginning to accommodate the differences and help the individuals work together?
- Are the members more alike or more different than you originally assumed?
- Are you more like the team members or more different than you originally assumed?

The facilitator or scribe from the team records in bullet points the ideas generated. A flip chart works well to save the ideas.

**Example:** Sample lists of perceived differences identified by team members and possible actions the team might take to accommodate the differences:
PERCEIVED DIFFERENCES

<table>
<thead>
<tr>
<th>Only person under 50</th>
<th>Only person with a maths background</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not a UK citizen</td>
<td>The only grandparent on the team</td>
</tr>
<tr>
<td>Youngest team member</td>
<td>Only person from the financial side of firm</td>
</tr>
<tr>
<td>Only person of Hispanic ethnicity</td>
<td>Only person without college degree</td>
</tr>
<tr>
<td>Sole woman on team</td>
<td>Buddhist</td>
</tr>
<tr>
<td>Labour union member</td>
<td>Work with customers instead of product</td>
</tr>
<tr>
<td>Muslim</td>
<td>I don’t like to write reports.</td>
</tr>
<tr>
<td>My adopted daughter is Russian</td>
<td>Don’t want to work overtime</td>
</tr>
<tr>
<td>Worked overseas</td>
<td>Don’t like team work</td>
</tr>
<tr>
<td>Least team experience</td>
<td>Single parent</td>
</tr>
</tbody>
</table>

POSSIBLE ACTIONS TO ACCOMMODATE DIFFERENCES

- Vary the meeting times to accommodate religious holidays or family duties.
- Agree to listen to each team member’s full explanation of her/his position.
- Use questions and active listening to develop understanding.
- Take time to explain why certain tasks need to be done in a team to accommodate the doubts of those who may not value teamwork.
- Take time to explain perspectives from different disciplines.
- Establish an agreed-upon way to recognise, admit, and resolve conflicts.
- Agree to “teach” other team members the perspectives you have and why you have them.

Follow-up: Save the post-its and the lists. They can be transcribed in a team history or part of the team’s virtual record on a website available to team members. Use the dialogue as a preliminary step to developing team shared norms and share goals (See Team Charter in Section 1.).
Alternate Questions: This basic method is highly versatile and can be varied depending on the goals of the facilitator and team members. For example, instead of having members identify their guesses as to what makes them the most different from the other members, any of the following questions can provide a good start for self-disclosure:

- What 5 things do you most want your team members to know and understand about you as a team member?
- What are 5 things you like least about working in virtual teams?
- What are 5 things you like best about working in virtual teams?
- What are 5 things you consider most important in your teammates?
- What are the most important 5 lessons you have learned about working in virtual teams?
- What are your 5 biggest successes?

Recognising personal assumptions and revealing assumed differences, followed by open dialogue often helps team members appreciate differences while also guiding the team to find similarities which will help them overcome and use those differences. Sometimes the differences revealed are deeply held values. The following tool provides a tool for revealing such values and working with them toward effective team performance.
TOOL | VALUES PRIORITY COMPARISON

WHAT IS IT?
The ‘values priority comparison’ is an engaging way to allow team members to 1) understand their own values and 2) see how their values compare to those of their teammates. By working first alone and then with the team members, the team mirrors much of the way their work in the team will be conducted.

WHY IS IT USED?
- To help diverse virtual teams to recognise when their differences are value-laden, not just differences in communication.
- To clarify the array of values involved and to do so early in the team-building process.
- To help the team anticipate and more comfortably manage the value differences.
- To help the team members recognise where they already have common ground on which they can build further progress.
- The team can plan for conflict resolution methods that may help them anticipate and resolve value-based differences along the team’s work toward its goal.

WHEN IS IT USED?
- It is used early in the team’s introduction to help break the ice and to begin the process of serious work.
- It is used to help virtual teams begin the process of identifying guiding principles and designing team charter.
- It is used when the team becomes bogged down or develops conflicts, to identify where the key sticking points are, and to help frame the degree of difference, so that ideas for resolution can be generated.

HOW IS IT USED?
Materials: Enough copies of the scale below for each team member. Space for team members to move around or space to post the values comparison scales so that all the members can see the results.
**DIRECTIONS:** For each of the items below, make an X on the line that most closely reflects your personal values priority between the two comments. Be sure to reflect on what you actually do, not what think you should do. When in doubt, think about your personal habits of behaviour as possible guides for your values priority.

<table>
<thead>
<tr>
<th>I prefer working early in the morning</th>
<th>I prefer working late at night.</th>
</tr>
</thead>
<tbody>
<tr>
<td>I value tradition</td>
<td>I value change.</td>
</tr>
<tr>
<td>I like speaking.</td>
<td>I like writing.</td>
</tr>
<tr>
<td>I enjoy debating issues.</td>
<td>I prefer harmony.</td>
</tr>
<tr>
<td>I prefer working with prompt people.</td>
<td>I am flexible.</td>
</tr>
<tr>
<td>I like to get right to the task.</td>
<td>I like to get to know the people I work with.</td>
</tr>
<tr>
<td>I like orderly thinking, one task at a time.</td>
<td>I like spontaneous thinking, moving in all directions.</td>
</tr>
<tr>
<td>I like competing with others.</td>
<td>I like to collaborate with others.</td>
</tr>
<tr>
<td>I am argumentative.</td>
<td>I am agreeable.</td>
</tr>
<tr>
<td>I’m an exact person.</td>
<td>I’m comfortable with vague ideas.</td>
</tr>
<tr>
<td>I want my individual work to matter.</td>
<td>I want the team work to matter.</td>
</tr>
<tr>
<td>My work matters more than my time.</td>
<td>My time matters more than my work.</td>
</tr>
</tbody>
</table>

**Instructions:** Have each team member complete the scale individually. (Usually takes about 10 minutes or less.) Then each member can connect the Xs with straight lines to see the pattern of values.

**Reviewing the results:** Choose any of the following methods to review and compare the results of the individual values in comparison with teammates.
• The individual charts can be placed on a bulletin board or white board, aligned so that all team members can view them in silent.
• Each individual can be given a transparency on which the scale has been printed. As they record their own Xs, they can mark them on the transparency. Then they can connect the Xs as the above instructions describe. The facilitator can then overlay the transparencies of the team members so that the pattern of values is apparent.
• Team members can exchange their individual charts in dyads and discuss how their charts differ and are the same.
• Place a piece of rope in the centre of the room (about 20 feet of rope is sufficient).
• As each of the items is called, team members can stand in the approximate location of the rope where they placed their Xs for that item. Team members can then be asked to observe how far apart or close together the team members are on each item. Each item can be discussed separately or the discussion can occur after all items have been symbolised.
• Regardless of the method of comparing, the final step in the tool is having the team sit in a circle (a round conference table works well) to discuss the implications of their shared results and their range of values.

**Strategies for using the understanding:** As a result of the discussion in Step 5) above, the facilitator may want to lead the team members through a further step in which they plan strategies for how to use their value differences to their advantages as a team. For example, the team may plan to have the members who are most time conscious be assigned to timekeeper roles more often, and the team members who are more interested in team success than their own success be in charge of critically evaluating the quality of team process and products.

The awareness of value differences may lead the team members to anticipate and discuss what steps they should take when a conflict arises which can be attributed to value differences among members. Planning for such conflicts before their occurrence gives the team members a chance to adopt an “anticipatory solution” when emotions are calm and reasoning can triumph. A skilled team leader, team facilitator or team member who recalls the results of this Values Priority Comparison may be able to help a team move more successfully through a conflict toward a collaborative resolution. The results of the values comparison can be saved and referred to when the team seems bogged down or in conflict. By studying the values differences, the team may be able to diagnose and resolve differences.
**EXAMPLE:**

Below is a sample of how the overlay of transparencies of a 5-person team might look. The symbols X, $, +, 0, and # represent the different scores for the five different team members.

<table>
<thead>
<tr>
<th>Preference</th>
<th>Symbol Configuration</th>
<th>Interpretation</th>
</tr>
</thead>
<tbody>
<tr>
<td>I prefer working early in the morning</td>
<td>$X 0 # +</td>
<td>I prefer working late at night.</td>
</tr>
<tr>
<td>I value tradition</td>
<td>$ 0 # X +</td>
<td>I value change.</td>
</tr>
<tr>
<td>I like speaking.</td>
<td>0 X # +</td>
<td>I like writing.</td>
</tr>
<tr>
<td>I enjoy debating issues.</td>
<td>X + 0 $ #</td>
<td>I prefer harmony.</td>
</tr>
<tr>
<td>I prefer working with prompt people.</td>
<td>$ X # 0 +</td>
<td>I am flexible.</td>
</tr>
<tr>
<td>I like to get right to the task.</td>
<td>+ X $ 0 #</td>
<td>I like to get to know the people I work with.</td>
</tr>
<tr>
<td>I like orderly thinking, one task at a time.</td>
<td>$ X # + 0</td>
<td>I like spontaneous thinking, moving in all directions.</td>
</tr>
<tr>
<td>I like competing with others.</td>
<td>+ X 0 $ #</td>
<td>I like to collaborate with others.</td>
</tr>
<tr>
<td>I am argumentative.</td>
<td>+ 0 X $ #</td>
<td>I am agreeable.</td>
</tr>
<tr>
<td>I’m an exact person.</td>
<td>X # $ 0 +</td>
<td>I’m comfortable with vague ideas.</td>
</tr>
<tr>
<td>I want my individual work to matter</td>
<td>0 + X $ #</td>
<td>I want the team work to matter</td>
</tr>
<tr>
<td>My work matters more than my time.</td>
<td>+ $ # X 0</td>
<td>My time matters more than my work.</td>
</tr>
</tbody>
</table>

In this example, the team might want to discuss such issues as the different values individuals place on teamwork vs. individual work, debate vs. harmony, change vs. tradition, rigid time vs. flexible time. To accommodate all preferences, the team may decide when to emphasise which values. Some agreed upon principles might be:
• Make sure all individual work is related to effective teamwork.
• Agree to debate key issues for a structured time, then to move toward agreement on an acceptable compromise or consensus after all sides have been heard.
• In deciding on what changes should be implemented, also agree upon what traditions or actions or habits we do not want to change.
• Structure meeting times so that early and late workers can be favoured at least some of the time.

Knowing the range of values about work style, time, and duty preferences reveals where the team may need to plan for overcoming conflicts. Even when a team has shared its values and planned to accommodate different styles, the degree of individual involvement may vary. An effective tool for ensuring engagement on the part of all members is the Feedback Circle.
Tool | Feedback Circle

What is it?
The feedback circle is a tool for ensuring that each team member is heard. The concept of sharing and allowing or requiring all members to share makes the team members feel responsible for being good listeners and for conveying information to their peers.

Why is it used?
- Helps ensure all team members have equal opportunity to be heard and to contribute.
- Helps a struggling team in which contributions of members are unequal.
- Helps a team that is being dominated by one vocal self-imposed leader.

When is it used?
- When members of a team are stuck in “politeness mode.”
- When members of a team are not sharing their expertise or their frustrations.
- When a dominant team member is not aware of her/his own affect on the team.
- When the team has reached a roadblock and is trying to re-energise the members toward the team goal.
- At the beginning of a meeting to clear the air or set the tone.
- At the end of the meeting to assure all issues and views have been heard.
- When either the team’s process or the team’s productivity is dysfunctional.

How is it used?
Materials:
- An object to pass from one person to another. A good object may be something manipulative such as a koosh ball. Another possibility is an object that is symbolic of the team’s work: a matchbox car of the type an automotive productivity team is working on, an artist’s brush for a creativity team, a building block for a team on strategic planning, a handheld magnifying glass for a visioning team.
- Something on which to record comments.

Directions
Team members sit in a small circle facing each other, preferably without a table separating them. Any team member, the team leader, or a team facilitator may ask for a Feedback Circle any time they believe the team is not listening or not sharing openly. (The possibility of the Feedback Circle as a communication, sharing, re-energising tool for the team can be suggested as a part of the team charter’s [See Section 2.] team norms of acceptable behaviour. This planning ensures that any member will feel justified in suggesting a Feedback Circle as a useful tool.

Each team member is asked to respond to the question or topic being addressed. A person may only speak when they are holding the “object.” As long as that person holds the object, everyone in the team is required to listen to them. When the team member holding the object has fully expressed their point, they must pass the object to someone else in the circle (this could be the person beside them or the team member can pass the
The recipient of the object must then first paraphrase the previous speaker’s comments and have the previous speaker verify that they have effectively understood their point. Only after the confirmation that they have effectively paraphrased the previous speaker should the team member holding the object then share their comment. Again, only the person holding the object may speak. The sharing and paraphrasing continues until all persons have spoken their views. Usually, the team is then asked whether anyone wants to continue the process for a second round through the circle. If the team desires, the process can be completed around the circle a second or even third time.

**Framing the Content in the Circle:** This circle method is versatile because the topic addressed can vary widely, such as the team’s process, team members sharing their individual frustrations or the team addressing what next steps are necessary to complete the task. The language used to frame the feedback is particularly important because it shapes the feedback that will be received. Some typical questions and ideas to frame the focus of the feedback are:

- What is your honest opinion about the progress of this team toward its goal?
- What about this team so far is most troublesome?
- What about this team’s activity is most useful?
- How would you change the path we are currently on for better team success?
- What is your opinion about the item that should be cut from the budget first?
- Where did we go wrong to get into this fix?
- What direction should we go now?
- Among the three ideas we have considered which one is the best next step and why?

**Diversity Relevancy:** Because people from different cultures, ethnicities, and functional areas often have different styles from others in a team, this circle feedback can be a regular method for sampling ideas, for checking feedback, for making sure that all people are valued for their differences, their perspectives, and for their expertise. The structured involvement of all team members is the key. When the team is particularly diverse, this circle method may be used more often to bring out different ideas. The circle can become a comfortable place for differences to be shared.

The Feedback Circle is an effective tool for engaging everyone. Sometimes, an outsider, someone who is not a member of the team, can also provide an effective observer of the team process. The Team Engagement Diagram uses an outside observer to illustrate a tool for evaluating the team’s inclusion of all members.
**Tool | Team Engagement Diagram**

**What is it?**
A Team Engagement Diagram is a tool for objectively visualising the communication pattern of a team at work. It allows the facilitator and/or team members to draw a diagram which represents the direction of oral statements and questions initiated by each team member as well as the focus of which members are the targets of such comments.

**Why is it used?**
- The diagram can quickly identify the dominant talkers in the team. Sometimes it takes a picture for these dominant members to ‘see’ their impact on the team.
- The diagram can be used to reveal who is most often the focus of a comment or question.
- The diagram reveals who is excluded or self-selects out of the team’s discussions. Sometimes seeing the lack of communication between oneself and others helps the reticent members initiate more readily, or spurs talkative members to seek input from the reticent member.
- The facilitator or team members can then alter the communication methods of the team to better engage all members.

**When is it used?**
- When the facilitator wants to check the involvement of all members.
- When a team is particularly different in values, cultural background, or ethnicity.
- When the team seems bogged down by a dominant member.
- When one or more team members are not participating in the team’s work.

**How is it used?**
**Materials:** A table at which all team members can face each other. A team engagement diagram evaluation form for the team observer. An observer is someone who is not a member of the team.
The observer sits just outside the team's workspace but close enough that they can hear and see all team members. The observer prepares for the team meeting by recording the names of the team members on the team engagement diagram form, and marking the names of the team members at the locations where they are seated around the table.

The team runs its meeting as it would at any other time. When the meeting begins, the observer monitors the communication using the following means (See Completed Team Engagement Diagram on following page):

- Draw a solid line pointing away from each person who initiates a question or statement. Point the line toward the centre if the comment is meant for the entire team. Draw the line to the exact person being addressed, if the message appears so aimed.
- Draw a broken line pointing away from each person who responds to the comment of another. Point the broken line toward the centre of the circle if the comment is meant for the team in general. If the response is to a specific person or persons, point the line toward that person's location on the circle.
The observer uses both verbal (the sender of the message addressing the recipient by name) and non-verbal (the sender looking toward only one person or toward everyone) cues to estimate the intended recipients of the message.

If the recipient does not respond, no arrow or line is drawn. Only draw proper responses.

While drawing the communication lines, the observer also places a hash mark (#) in the appropriate column on the form beside the team member indicating whether the comments the team member made were initiating a comment or responding to a comment.

Throughout the meeting, the observer records every comment, or the observer may record for only a limited period of time (for example, 15 minutes at the beginning of the meeting and another 15 later or toward the end of the meeting).

EXAMINING THE RESULTS

The meeting should end 5-10 minutes earlier than usual, so that the observer may share what the diagram reveals. In the example on the following page, for example, Ramone only initiated one comment. Tom and Aditya appeared to be speaking mostly to each other. Both Tom and Aditya generated many initiations and many responses, but Kia and Kim’s comments seem to be ignored by Tom and Aditya.

At the conclusion of the meeting, the observer shows the diagram to the entire team and asks the team to comment on the diagram. A discussion usually follows which aims directly at the team process. Some common issues to address are:

- How can the more talkative members self-monitor and invite the input of all members?
- How can members that are more reticent take more initiative?
- What are some agreements we can make about ensuring all members are heard and listen?
- How can we structure the discussion to keep the energy high while including everyone?

Variations on the method: This simple tool can be used without an official outside observer. Some virtual teams, particularly in their early stages, may make ‘the observer’ a rotating role among team members. Being the observer gives each team member a chance to observe and see their own and other input and responses. At the end of the meeting, the internal observer reports and shares the diagram. Then the team members can address issues they see as important about the diagram. Sometimes, for example, it may be appropriate to have one team member dominate (one who is giving a report, for example) and others less talkative (listening intently). The goal of the diagramming is to be sure that the team’s current method is effectively using the talents of all the members.

The Team Engagement Diagram may serve as a visual tool for identifying possible unintended exclusions of particular members. Often a single meeting using such a diagram will cause team members to work more carefully to engage all members. Other virtual teams may find that the diagram method is a tool to be used at each meeting.
The title of this chapter suggests that conflict is something to “fix” or resolve, and in many cases, that assumption is true. However, before assuming that all conflict should be solved, we should also recognize that conflict can provide energy and input which can push team members to work toward better accomplishment. Conflict allowed to fester or distract members from the work of the team project must be managed. Knowing when to manage conflict becomes a question of timing, skill, and judgment. This chapter addresses common causes of team member conflict, some benefits of conflict, activities which may help manage conflict, and suggested interventions to manage team conflict.

DEFINITION AND CAUSES OF CONFLICT

When members are asked to contribute to a team project, their individual skills are likely to be necessary for a team to succeed. Yet their individual skills and perspectives are not expected to be identical to the skills and perspectives of other team members – if the work could be done effectively by one set of skills, then a team would not be needed. The placement of individuals with different views, skills, and experience into group projects naturally generates some degree of conflict. For purposes of this chapter, conflict is defined in Table 5.1 using the language offered by Van Slyke (1999):

CONFLICT DEFINED & CAUSES IDENTIFIED

| CONFLICT | The competition between interdependent parties who perceive that they have incompatible needs, goals, desires, or ideas. The key causes of conflict are: |
| Competition | The desire to win or to have one’s own views, performance, or input valued above the work of others generates conflict and identifies a significant barrier to conflict resolution. |
| Interdependence | When we are required to work with others to accomplish part of our goals, we may both recognize the necessity of our dependence and simultaneously resent the dependence because we are not in total control of the situation. |
| Perceived Incompatibility | Our own biases and perceptual filters can establish obstacles that make common ground and agreement difficult to establish; the perspective that we are not likely to agree prevents either party from being the first to cooperate. |

(Van Slyke, 1999, p. 5) Table 5.1
When virtual teams experience conflict, it is natural to assume the result will be negative – after all, conflict generates frustration for team members. We should also recognize that anytime conflict occurs within a team, there is a chance for the team to learn something new and for individual team members to develop perspective and team management skills. Attention to the benefits of virtual teams can help team members face conflict more comfortably.

**BENEFITS OF CONFLICT**

Conflict can benefit a team and even help its overall effectiveness because it tends to generate more critical thinking. Table 5.2 summarizes some of the advantages conflict can facilitate.

**Table 5.2**

<table>
<thead>
<tr>
<th>Benefit</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expanded Awareness</td>
<td>When conflict interrupts a smooth work context, the result is an increased mindfulness on the part of group members – their alertness to novel issues creates a chance for new input.</td>
</tr>
<tr>
<td>Improved Participation</td>
<td>When faced with conflict, team members often “spring into action” in order to make their best arguments against the apparent opponent. Sometimes seemingly apathetic team members become deeply involved in the team’s work as a result of facing an “enemy.”</td>
</tr>
<tr>
<td>Increased Productivity</td>
<td>Once a team has been through conflict and successfully solved its differences, the new solutions, ideas, and procedures may lead to greater productivity than before the conflict.</td>
</tr>
<tr>
<td>Greater Cohesiveness</td>
<td>Once the conflict is resolved, many virtual teams actually experience greater cohesiveness. A better understanding of their differences tends to build a common bond among team members and generate a sense of oneness.</td>
</tr>
<tr>
<td>Developed Maturity</td>
<td>Once conflict is resolved, members often have increased their team and interpersonal skills so that they are better able to suppress their egos, practice empathy, and convey patience.</td>
</tr>
</tbody>
</table>
The benefits Fujishin (1999) names are not the only benefits. Research in group process has identified that too much agreement can lead to groupthink (Janis, 1982), a situation which leads to ineffective decisions due to a desire to maintain harmony and cohesiveness over task effectiveness. If too much agreement and routine thinking are occurring in a team, occasional controversy may revitalize the team. Learning how to judge whether conflict is constructive or dysfunctional can help team members respond more effectively to conflict. Table 5.3 offers advice on how to think about conflict in ways which can help the team’s productivity.

**USING CONFLICT AS AN OPPORTUNITY**

- Conflict is natural and can be valuable.
- Conflict can be a source of energy.
- Conflict is a result of real differences.
- Different perspectives are often necessary for breakthrough thinking.
- One’s views and habits in handling conflict are important determinants of the outcomes of a conflict.
- Mastering skills in managing conflict takes a lot of practice.

(From Scholtes, et al., 1996, p. 7-2) Table 5.3

**TYPES OF CONFLICT**

Most conflict falls into one of three categories: procedural conflict, substantive conflict, and interpersonal conflict (Fusjishin, 2001). Procedural conflict refers to process, policies, and structure of the work done by the group. How a meeting runs, the mechanics of who does what, and the order of the agenda are some procedural sources of conflict. Substantive conflict involves significant task related conflict. Examples of substantive conflict include disagreements about what tasks take greater priority, what goals are the most critical, and which values the team collectively wishes to emphasize. Interpersonal conflict deals with people’s feelings and behaviors, habits and preferences.

When we understand that different types of conflict can be managed differently and may take different degrees of engagement, we can learn to respond more effectively to the conflicting situation and more successfully resolve conflict among team members.

**ANTICIPATING CONFLICTS**

Virtual teams will be better able to resolve significant conflicts when they recognize that teamwork naturally generates conflict. Thinking in advance about where and when conflicts are likely to occur allows the team to plan ahead, prevent some of the problems, and better manage the conflicts when they do arise. How can virtual teams anticipate when conflicts are likely to occur? Some of the research on virtual teams and groups helps to predict when conflict is more likely to happen; Table 5.4 suggests common sources of team conflict.
WHEN IS CONFLICT LIKELY TO OCCUR?

### Conflict is likely to occur...

- When time pressures to meet deadlines are significant.
- When virtual teams are in the storming stage during the process of getting to know each other and getting to understand each other’s preferences, values, skills, and experience.
- When several options are feasible, but individuals have strong preferences for very different options.
- When the value systems of team members are challenged or threatened.
- When individual performance is likely to be affected by the team’s behavior or work quality.
- When individual pay or reward is affected by the team’s work or individual team members.
- When the mission or task of the team is not clearly understood but is nonetheless important.
- When a new team member is added, the readjustment phase is very much like storming.
- When the team is asked to change its goals, change its methods, change its task or focus, or increase its productivity – change leads to conflict.

Table 5.4

Team members who know that conflict is more likely at particular times may react thoughtfully and constructively. In addition to knowing the triggers for conflict, team members can prepare for conflict resolution by understanding the typical behavioral responses to conflict.

COMMON RESPONSES TO CONFLICT

How virtual teams manage conflict will be partly determined by how the individuals in the team handle conflict. Their habits or comfort level with conflict as well as the nature of the conflict may cause them to be cooperative or assertive in conflict situations. Thomas (1992) developed a model of typical responses to conflict by creating a comparative matrix using assertiveness and cooperativeness as the axes. Figure 5.1 captures the dimensions of conflict responses Thomas identified.
By comparing the degree to which team members assert their own views with the degree to which team members seek to cooperate with other team members, five typical types of responses may arise. When individuals are neither assertive nor cooperative, their behavior becomes avoidance – they disengage from or ignore the conflict. In some cases they may choose to leave the team. When individuals rigidly assert their views and do not seek to cooperate with other team members, their response is competitive or controlling – they seek to win the argument or have the resolution go entirely in their own direction. When individuals seek cooperation with others over any assertion of their own views, they acquiesce or become accommodating – they are willing to sacrifice their preferences entirely to enhance the cooperation of the group. When individuals seek to both assert their own views and cooperate with other team members so that each side gains some but not all of what it originally wanted, they are compromising – willing to go with an acceptable outcome over an optimal outcome. When team members seek to satisfy everyone’s concerns at the highest possible level, they use problem solving methods which require both high assertiveness and high levels of cooperation; this response to conflict is called cooperation – achieving an even better solution based on clearly understanding and integrating the needs of all team members.
DEGREE OF COMFORT IN CONFRONTING CONFLICT

Recognizing and managing conflict usually requires at least one individual to express concerns to the team about an issue of conflict. If everyone in the team is averse to confrontation, the ability to openly name conflict, identify its causes, and agree on solutions becomes a significant challenge. Failure to openly express conflict issues can intensify conflict and lead to virtual teams bogged in an artificial politeness mode. A good and simple tool to help team members prepare for conflict identification is the Confrontation Comfort Zone Self-Check.
TOOL | CONFRONTATION COMFORT ZONE

SELF-CHECK

WHAT IS IT?
This self-check is a tool for helping individual team members understand their readiness to raise issues of conflict. It is based on the notion that identifying conflict requires a person who is willing to raise a contradictory issue or to confront the team’s process or performance.

WHY IS IT USED?
- To help individuals anticipate their own behaviors in conflict situations.
- To help team members understand the possible behavior of teammates when conflict arises.
- To help team members plan for how to manage conflict situations before they arise.

WHEN IS IT USED?
- It is used early in a team’s formation to help members prepare in advance for conflict.
- It is used when a team is facing a conflict which is hard to articulate.
- It is used when a conflict mediator is trying to help the team frame the conflict and work on solutions.

HOW MUCH TIME DOES IT TAKE?
The self-check can be completed by individuals in about 5 minutes. Discussion within virtual teams or in an intervention setting can take as little as 20 minutes or longer, depending on the issues raised by the participants or the intervention facilitator.

HOW IS IT USED?
Materials: Copies of the Comfort Zone Self-Check in Table 5.5 below for all the team members.
Instructions: For each of the situations below, indicate your level of comfort by placing an X on the line beside each question. Place the X on the line in the location which best describes your likely comfort in vocalizing confrontation issues in the situation identified. Place the X closer to the Active dimension when you feel more comfortable making your views externally known, when you are most comfortable talking, asserting, or leading the discussion. Place the X closer to the Receptive dimension when you feel more comfortable keeping your thoughts to yourself (internal) and prefer to listen, observe, or support others.
COMFORT ZONE SELF-CHECK

In each of the situations below, place an “X” on the line between the Receptive (R) and Active (A) arrows which identifies the behavior most comfortable for you in that circumstance.

<table>
<thead>
<tr>
<th>Situation</th>
<th>R</th>
<th></th>
<th>A</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meeting with team members</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Meetings with your boss/supervisor</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>One on one with a team member</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>One on one with someone you don’t know</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Addressing a topic you know well</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Addressing a topic about which you know little</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

After each team member has completed the self-check, the process for discussion can unfold in several ways.

Some possible questions to address:

- If you placed the X closer to the Receptive end on all of the items, how comfortable can you be with asserting problems or confronting teammates?
- If you placed the X closer to the Active end on all of the items, how comfortable can you be with listening carefully to the concerns of others?
- If your X placements are about half toward the Active end and about half toward the Receptive end, does that mean that you can be both receptive and active?
- If all team members are largely Active or largely Receptive, what kinds of problems can the team have in confronting, identifying, and solving conflict?
- How can knowing each team member’s comfort zones with conflict help the team resolve conflict?
- Can the team plan ahead to agree that all team members will attempt to be both receptive and active in addressing conflict issues?
RESOLVING TEAM CONFLICT

Most experts agree that conflict is not typically resolved without some focused effort. If the conflict seems minor, then allowing time to just let the conflict “fade away” may be feasible. However, most virtual teams have limited time, limited energy, and considerable work to accomplish. Therefore, having a conflict resolution process ready to help will expedite problem solving and move the team forward more quickly than will ignoring the conflict. Clarifying the conflict, looking at the causes, and choosing resolution strategies can take time but appear to be essential before taking action. The Conflict Resolution Process identified in Figure 5.2 offers a simple model for helping a team work through conflict.

By describing the conflict in behavioral terms that are not loaded with blame or certainly, merely descriptive words, the conflict can be framed so that all team members understand the nature of the conflict. Describing the conflict in “I” statements such as “This is how I see it…” can help show that some of the observations are subjective, but nonetheless real. Once the conflict is framed, the team can begin to look at why and how the conflict arose. This step involves having team members who are willing to receive questions, and assert their opinions. A key part of this step is to make sure that all team members have both shared their views and observations as well as understood what others have offered as input. Negotiating a resolution can take time, but will be more effective if all team members are included and can approach the conflict situation as a chance for mutual problem solving. Once the team has found an acceptable resolution, how that solution is implemented makes a significant impact on whether the conflict is actually resolved. Therefore, putting the decision in writing, agreeing on who does what, and setting a meeting to follow up after implementation are essential. It will be important for all team members to “see” the implementation results and verify that the conflict is actually solved. If not, the 4-step process may be necessary again.
Respectful discussion of the causes of conflict may be challenging, but team members will find that the calm discussion of issues more effectively leads to understanding and resolution. Still, conflict usually generates emotive reactions which influence team member behaviors. In the DENT model (Figure 5.2), steps 2 and 3 require well-modulated exchanges of perspective. The team leader or facilitator, or the team members themselves may need to define a structure which guarantees respectful exchange of views. When asking for causes of conflict, the most common method for learning the various issues involves having the parties express their observations and opinions directly to each other.

Challenges come when individuals seek to advocate for their own positions without fully understanding the positions of others. Making sure that the causes are clearly understood by everyone requires a balance of advocacy and inquiry. Facilitating the exchange so that a balance of advocacy and inquiry occurs, helps satisfy the need for information and helps meet the needs for emotional support. The Advocacy/Inquiry Matrix in Figure 5.3 (Smith, 1993) illustrates the behaviors involved in advocacy methods and inquiry methods.
In each box the behavior that is underlined reflects actions which are most helpful in making progress during conflict resolution interventions. Individuals who seek to explain, discussion, dialogue, make sense of others’ views, interview, and clarify are more likely to contribute to the effective resolution of team conflicts. Those individuals who dictate, lecture, politic, critique the process, withdraw, and interrogate detract from the process. Before the discussion begins, a facilitator may want to show the participants the Advocacy/Inquiry Matrix and highlight the types of behaviors that are likely to be positive.
**TOOL | ADVOCACY/INQUIRY MATRIX**

**WHAT IS IT?**
Balancing advocacy and inquiry is a structured process for understanding team member positions and reasons for their thinking. It requires team members to explain their logic for the positions they advocate and it requires team members to inquire about (and listen to) others’ opinions and reasoning. The result is a better understanding of different positions and a more inclusive problem-solving strategy that engages all team members. It uses a variety of skills to move beyond the conflict. The notions of advocacy and inquiry are borrowed from the work of Diana McLain Smith (1993).

**WHY IS IT USED?**
- The advocacy/inquiry matrix helps open the minds of team members about both their own positions and those of other team members.
- It requires information and logic from all team members.
- It helps to break team deadlocks and open new perspectives.

**WHEN IS IT USED?**
- It is used when virtual teams are stalled, when conflicts create deadlocks, and when the team is faced with complex and confusing issues.

**HOW IS IT USED?**
**Materials:**
Definitions of advocacy and inquiry, visible so that all team members can see them clearly (flip chart, power point slide, white board).

- **Definition of Advocacy** – Identifying one’s views and how one arrived at them (logic, data, experience, assumptions).
- **Definition of Inquiry** – Seeking others’ input and asking questions.

**INSTRUCTIONS:**
Schedule a team meeting for the purpose of conflict identification – clarify that the goal of the meeting is not to work on the task of the team but to identify the conflict and understand it. Ask team members to come prepared to explain their positions and the logic behind them and to be prepared to seek opinions and to listen. Begin the meeting by explaining the process of balancing advocacy and inquiry, clarifying that both advocacy and inquiry are necessary to understand the conflicts and to move beyond them. It may also be a good idea to review the ‘ladder of inference’ (Senge, et al.) idea and show how important it is to stop false inferences about each other’s intent before they become even more inaccurate (see the model below).
IDENTIFY KEY ISSUES WHICH GENERATE CONFLICT

Identify the number of issues about which there is conflict. Try to keep the list of issues to 3 or less. If the team generates a significant number of issues, the first step will be to see if there are more general issues that encompass or umbrella several of the more specific conflicts. Write the issues on the flipchart. Take each issue and follow the advocacy and inquiry steps for each. These steps are based on the protocols developed by Diana McLain Smith (1993) and The Fifth Discipline Fieldbook (Senge, et al., 1994).

Frankly, most team members are better at advocacy than at inquiry. Advocates have tended to think about ways to support their viewpoints and to explain their reasoning. Their efforts at building support for their positions often overshadow their ability to see gaps in their own logic or other opportunities that might be better.

Step 1 – Improving Advocacy – Make your thinking process ‘visible’ to the rest of the team by communicating as follows:

Clarify your position:
- Identify the assumptions on which you base your thinking.
- Explain the reasons for your assumptions.
- Describe the context – who will be affected by your point of view, how will they be affected and why?

Instead of using the dictating, asserting, and lecturing tones and language that you may be motivated to use, try using explaining instead. Explaining is less emotional and opens the door for feedback.
Step 2 – Improving Inquiry about Your Position – Invite team member responses: (Emphasise interviewing and clarifying not interrogating.)

- Ask for team members’ observations, opinions, and critiques of your position, assumptions, logic and context.
- Listen carefully to the responses, do not interrupt or argue. Avoid defensive non-verbal and verbal communication.

Step 3 – Improving Inquiry About Other’s Position – Ask others to make their thinking processes ‘visible’ to the rest of the team by communicating the following: (again, emphasise clarifying questions over interrogating questions.)

- Ask what data they used to build their assumptions.
- Use non-aggressive language; “Can you help me understand...?” rather than “What do you mean?”
- Learn as much as you can about their thinking and assumptions.

Step 4 – Objective Comparison of Assumptions: Move to the far right upper quadrant of the matrix by emphasising dialogue and discussion, not politicking.

- How are our assumptions similar and how are they different?
- Ask the others to comment on your answers.
- Listen for new clarity; do not promote your own position.

Step 5 – Look for New Information – Look for what information is missing that will help the team see new directions by communicating the following:

Seek objective and subjective information:

- What do we know?
- What don’t we know? How can we find out about it?
- What is unknowable?
- What do we ‘sense’ is true but do not have data for yet?

Stretch the boundaries of the different positions:

- What would have to happen for you to consider the alternative?
- How could the team re-frame the situation to eliminate the conflict?
- Reject any attempts to “agree to disagree.”

Step 6 – In round-robin fashion ask team members for ways they can see of moving forward, re-framing the issues and finding a collaborative solution. Usually this process leads to several changes in positions and the opportunity to move beyond the conflict.
WHO IS RESPONSIBLE FOR RESOLVING TEAM CONFLICT?

Allowing virtual teams to solve their own conflicts seems the more effective strategy of conflict resolution. When virtual teams are able to solve their own conflicts, their sense of accomplishment and general team energy is likely to increase. Whenever possible, having virtual teams themselves anticipate and prevent or neutralize conflicts before they occur works better than having outsiders intervene. If the team members can create a climate where all problems are considered team problems for which they are all responsible, the chances of empowering virtual teams to solve their own conflicts increases. Learning also not to overreact or to underreact can also help virtual teams develop the patience to let minor conflicts resolve themselves and major conflicts receive sufficient attention from the group so that other individuals will not be necessary. Nonetheless, not all conflicts can be resolved by the team members themselves. When conflicts are serious and a team is not capable of solving the conflict, intervention by an outside person becomes a useful tool.

TYPES OF INTERVENTION

Typically, the intervention is conducted by a team leader or team sponsor, and occasionally by a specially appointed mediator. The effectiveness of intervention by nonteam members depends very much on the credibility of the intervener. Thus, the team sponsor or team project manager is likely to have the greatest success in achieving intervention. An intervention leader can use a range of resolution techniques. We recommend using the technique which can effectively solve the conflict with the least amount of intervention. Scholtes et al. (1996) suggest six levels of intervention. They are described in Table 5.6.
### Levels of Intervention

<table>
<thead>
<tr>
<th>Level of Intervention</th>
<th>Content of Intervention</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nonintervention</td>
<td>Do nothing; let the team manage its own conflict or ignore it.</td>
</tr>
<tr>
<td>Minimal intervention</td>
<td>Talk to individuals outside of the team meeting and allow them to make suggestions about how their satisfaction can increase.</td>
</tr>
<tr>
<td>Low intervention</td>
<td>Identify any problems the team is facing and include the conflict as just another problem without naming individuals or offering solutions. Let the team reflect but do not force any action.</td>
</tr>
<tr>
<td>Medium intervention</td>
<td>Outside of a team meeting, confront the individuals who are contributing to the conflict, offer suggestions on how to change. Offer a contract and specifics which they can consider to alleviate the conflict.</td>
</tr>
<tr>
<td>High intervention</td>
<td>In a team meeting, the leader raises the conflict issue and facilitates the team’s open discussion toward an agreed behavior change.</td>
</tr>
<tr>
<td>Very high intervention</td>
<td>Removal of dissatisfied team members. This intervention is the most extreme and should not be used when any other options appear to be possible solutions.</td>
</tr>
</tbody>
</table>

Before seeking an intervention or before facilitating one, some reasonable concerns should be resolved. Think about where an intervention might start – particularly, try to identify at least one factor of the team’s conflict which can be clearly defined and which is the most likely place where progress can be made (Scholtes, 1996). Think seriously about whether not intervening is riskier than intervening. Sometimes, problems do resolve themselves; and sometimes, failed interventions make the conflict more rancorous. Most importantly, can the
facilitator of the intervention be a neutral and fair arbiter; that is, do all parties involved view the intervener as a credible person with expertise and a reputation of integrity? If not, then find someone who is credible and accepted by all parties. If you are comfortable that these issues are resolved, then the process of intervention will be more likely to succeed.

**PREPARING FOR CONFLICT INTERVENTION**

All parties involved in a conflict intervention deserve fair chance for the intervention to succeed. That fairness for success also applies to the facilitator of the intervention. How the intervention is framed, introduced, and managed can affect the level of success. The intervention should occur in a location which provides neutral ground for all participants; often neutral location is achieved by taking the participants away from the typical meeting place. The intervention agenda should be known by all parties; the agenda should be agreed upon and followed. The general setting should be informal but organized so that all parties can both listen and speak. Respect for the parties involved suggests that the time devoted to intervention should be well managed – if an hour meeting is agreed upon, then the meeting should conclude within that time. Using active listening and constructive feedback methods will help achieve greater understanding and respectful behavior among the participants.

**WHAT IF NOTHING WORKS?**

Most conflicts can be solved, but some conflicts are so deeply held or complex that their resolution is not possible. If all possible efforts have been made to resolve the conflict in a reasonable time without observable progress, then more dramatic methods may be helpful as last resorts. For example, sometimes a team of 6 to 10 members may be divided into two virtual teams of equal number. If the task can be completed by two different virtual teams at a satisfactory level, then separating the membership may be acceptable. Even if a team’s conflict is not solvable, try to at least go through Step 2 of the Conflict Resolution Process (Figure 5.2) and identify what was learned. Such a step may help you or team members avoid such causes of conflict in future virtual teams.

This chapter provides some possible reactions to conflict which are designed to help virtual teams make progress toward their goal accomplishment. Sometimes merely defining the conflict can be sufficient to have virtual teams begin to resolve the conflict on their own. In other circumstances the team members may be able to apply some of the suggestions in this chapter without an outside facilitator. When a team conflict is severe, then a facilitator can make the conflict resolution process more effective by assuring fairness and using a process which is efficient and respects all sides. When conflict resolution methods are not successful, it may be possible to restructure the team or to reassign parts of the project on which the team members can agree.
A critical but often ignored skill for all team members is conducting successful meetings. Meetings are a necessary item for virtual teams. Meetings that are not run well have detrimental affects upon the team and can lead do the demise of the team. Virtual teams need to meet to discuss different points of view, to make decisions and share information. Meetings where the team moves forward and accomplishes a specific goal or task will provide momentum and add to the success of the team. Successful meetings require planning and well-defined processes that will help to ensure success.

THE PROCESS

Successful meetings require significant work before the meeting, during the meeting and after the meeting. Meetings need to be planned to make good use of the time of all the team members. Issues that need to be addressed before the meeting include:

- The purpose or reason you are meeting and how it relates to the team goals and objectives.
- What your agenda will be to accomplish the purpose of the meeting.
- The time limit and place of your meeting.

BEFORE THE MEETING

The process is based upon the letters PAL (Purpose, Agenda, and Limit). For the first meeting the purpose may be, for example, to determine the team charter. The agenda items should be selected to help you achieve your purpose. The limit refers to the amount of time that has been allocated for the meeting. Typically, the last item on the agenda is to determine the purpose and key agenda items for the next meeting. Thus, the purpose for the next meeting and at least some of the agenda items can be generated by the members of the team at the end of the meeting. Seeking input from the team about what should be done next (the Purpose) and how it should be done (the Agenda) ensures that the team members think there is a need to meet and that the meeting’s activities are relevant and useful.

When the purpose and agenda have been completed, they are shared with the other team members before the meeting to provide members with the opportunity to think about and plan for the meeting. This is particularly true for individuals who will make reports at the next meeting. Agenda items should be available at least 24 hours before the meeting. In some cases virtual teams determine, as part of their expectations, how far in advance the agenda should be provided.
DURING THE MEETING

During the meeting, the following list of activities will help each time you meet:

- Begin by reviewing the agenda and making changes as needed.
- Clarify roles such as note taker as needed. (Note: a written record should be kept for all meetings) A timekeeper should also be assigned.
- Follow the agenda.
- Make sure that everyone has an opportunity to express his or her views. Do not allow any one person or group to dominate or intimidate. Summarise the discussion where appropriate to help move through items on the agenda. Be task oriented and attentive to the process while engaging all of the members.
- Encourage everyone to share his or her views especially on important decisions that will require support later.

At the close of the meeting

- Review action taken and assignments made
- Solicit agenda items for next meeting
- Solicit responses about the meeting process and direction of the team.
- Identify where and when the next meeting will be.
- Thank members for their participation.
- END THE MEETING ON TIME.

AFTER THE MEETING

The meeting minutes should be distributed as early as is possible. Using E-mail provides a quick way to distribute the minutes and remind people of work assignments.

GROUND RULES FOR MEETINGS

Ground rules provide additional structure that will help ensure that your meeting time is used to full advantage and thus your meetings can begin and end on time with everyone present. Ground rules are generated with the entire team present and must be agreed to by all of the members. Typical areas to be considered include the following:

- How will you make decisions?
- How will the start and end times be determined?
- What will be the attendance policy?
- What are the expectations regarding promptness?
- Will you allow for smoking or other breaks?
• How will you rotate time keeping, note taking and record keeping activities?
• Do you need an interruptions policy (will mobile phones be permitted?)
• How do we guarantee courteous and professional behaviour?
• How will we ensure participation?

FEEDBACK AND MEETINGS

Learning and improvement can be enhanced through appropriate feedback. A fundamental part of the learning process is detecting problems. Feedback is the most common way that individuals and virtual teams can improve. So saving five minutes near the end of a meeting to ask for comments from each member can help to identify problems and other issues early on.

Even with feedback time being a part of every meeting important concerns may not be dealt with because of time constraints or other problems. If you walk away from a meeting and hear comments like, “That meeting was a complete waste of time”, or “Why are we spending all this time on this topic?” then you are in an environment where more significant comments about the meeting are needed. In this case, the team may need to go back, review the charter, and perhaps consider conflict resolution approaches. From the perspective of a team, feedback should occur at the end of most meetings and should be expected and be a part of the standard agenda of the team. Topics that are typically part of meeting feedback include the following:
• Did we discuss the right items that will help us reach our goals?
• Was our approach (including agenda items) acceptable?
• Is our pace and the time spent on each item appropriate?
• Are our meetings too long?
• Can anyone think of a better way to approach this problem?
• Are we allowing all people to be heard on the issues?
• Are we following our guiding principles?
Feedback indicates where changes should be made so the team can better meet its goals. When feedback leads to changes that provide improved processes, individual members will trust the process, knowing their needs and concerns were dealt with. Constructive responses can facilitate improvement and can actually enhance team performance.
WHAT IS IT?
Team meetings are the basic collaborative environments where virtual teams accomplish their work. If team meetings are not effective, the work of the team is slowed, the productivity is poor, and team morale is low. The Team Meeting Effectiveness Evaluation is a versatile and efficient barometer for measuring team meeting quality in both process and work accomplished.

WHY IS IT USED?
Measuring the team’s process and productivity is an important early and regular step to team effectiveness. This tool forces the team to face process and productivity problems early and helps the team identify the general quality of the work it conducts.

WHEN IS IT USED?
- When the team is developing its patterns of behaviour in the early stages.
- After any team meeting, as a check-up on team effectiveness.

HOW IS IT USED?
Materials: A brief evaluation survey instrument. A sample survey of some typical questions is provided in Exhibit 7.1.
### TEAM MEETING ASSESSMENT

<table>
<thead>
<tr>
<th>Strongly Disagree</th>
<th>Strongly Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2</td>
</tr>
</tbody>
</table>

**The agenda for this meeting was distributed in advance of the meeting.**

**The agenda was consistent with the team’s charge.**

**The team stayed on track during the meeting.**

**Members came to the meeting prepared.**

**Team members shared their knowledge.**

**Input among team members was balanced.**

**The team process was helpful to achieving the team’s task effectively.**

**The team accomplished its goal for the meeting.**

**Meeting time was used effectively.**

**Team members were encouraged to participate.**

**Team members followed the team ground rules for meetings.**

**The members left the meeting knowing their responsibilities for the next meeting.**

**The members left the meeting knowing the time and location of the next meeting.**

**The meeting was productive.**

**The meeting ended on time.**

**What changes could be made to future meetings to improve the process or effectiveness?**
Instructions: This or similar team meeting surveys can be completed in several ways. It may be useful to pass the survey out in the last 5 minutes of the meeting and ask the team members to quietly complete the form separately. At the beginning of the next team meeting, the feedback can be shared and any problems in process or productivity that the survey revealed can be addressed or a time scheduled devoted specifically to team effectiveness issues.

Another way to use the survey is to post the questions online and ask that feedback be submitted by computer. Occasionally, the team facilitator may wish to conduct the feedback session at the end of a meeting and ask for general comments with the survey shown on an overhead as a guide. Obtaining the feedback in different fashions may encourage the team members to pay particular attention to process and effectiveness.
This section focuses on tools that can provide structure to the decision-making process. The first part of this section discusses how decisions are typically made in a team environment. The remaining sections focus on tools that help structure the decision-making process.

Decision-making in virtual teams involves a multi-faceted set of integrated activities. These activities are designed to provide the best solution for specific problems, based upon a set of well-defined criteria. Virtual teams make a variety of different types of decisions at various times but the two major areas where virtual teams make decisions are when they select a project or problem to solve, and when they choose a solution to the problem.

The decision-making process starts by determining who should make the decision. Some decisions can and should be made by the team leader, whereas the members of the entire team need to make other decisions. The magnitude or complexity of the decision is one of the variables that determines who makes the decision. Other factors include the importance of the decision, the departments involved, the difficulty implementing the decision, and the relevance of the outcome to the organisation. Another perspective is who takes final responsibility for the impact or result of this decision. The specific situation and the members of the team will determine how the decision will be made and by whom. Some of the common approaches in use are presented below.

**THE DECISION MAKING PROCESS**

Although there are exceptions, most major decisions require consensus in order to have the buy-in and support that is needed. Getting to consensus is not easy but it is important because it will provide a stronger sense of commitment and involvement. There are many potential roadblocks on the way to consensus. Team members may knowingly or unknowingly adopt the view that departmental or divisional interests are more important than the interests of the organisation are. Another important perspective that can easily be overlooked is that of the customer.

What is best for a department is not necessarily best for the customer. Individuals may also have their pet project or personal solutions to problems that they will choose to support at the expense of the department, division, organisation or the customer. Virtual teams sometimes give in to individuals who are the most persistent, the most aggressive, or who speak the loudest, longest or most often. Recognising the need to meet a goal such as satisfying the customer can help to put individual or departmental priorities in perspective.
Difficult and challenging decision-making environments are not uncommon and it is important and necessary to have decision making processes that will help maintain objectivity, seek consensus, keep the team moving forward and move the team to do what is in the best interest of the organisation. Choosing the most appropriate process that will enable your team to make the right decision is the place to start once the problem has been determined and the right people have been identified. Research indicates that virtual teams without decision-making skills and processes tend to flounder, waste time and often end up in arguments. However, those with good decision-making skills and well-defined processes make superior decisions, experience high commitment to and more rapid implementation of ideas. Thus, selecting a workable process for the particular decision-making environment is critical. The model below outlines the process that may be used to reach consensus.
 TOOL | REACHING CONSENSUS

Although there are exceptions, most major decisions require consensus in order to have buy-in and support. Consensus involves selecting a decision that all members of the team can support. It means that everyone understands why this decision is the best for the team at this time.

WHAT IS IT?
A process helps a team reach consensus about a decision.

WHY IS IT USED?
- Because keeping the team in alignment is easier when decisions are made in consensus.
- Because the team’s work involves much more than deciding, the team must work together often through implementation and follow through.

WHEN IS IT USED?
- When the decision is important and will require buy in from the team.
- When the decision forms the basis of other decisions the team will make.
- When a decision is controversial or there are strong points of view on the team.
- When the implementation process may be long or complex.

HOW IS IT USED?
- Understand what the problem is that you are attempting to solve. Gather whatever information is necessary to see the problem from multiple perspectives including who is involved, how often it occurs, when it occurs, who is affected, why it occurs and what are the results. More information about this process is provided later in this section.
- Generate as many potential solutions as possible.
- Reduce the number of possible solutions to a few (usually 3 to 5) and validate that these solutions will solve the problems. This process requires that each alternative be further analysed. Remember the solution you chose must solve your problem. As you consider the options, check to make sure you are comfortable with the solution and that it is an idea that you could support and implement. Be sure that new and creative ideas are given full consideration.
- Choose objective criteria to evaluate your options. The criteria should be relevant, and important to the success of what the group is doing. Typical criteria deal with issues such as impact on the customer, cost, time to implement, ease of implementation, acceptability of others, value added to the process, etc.
- Compare each option to the criteria using one of the available models. The option chosen will normally be the option that best satisfied the criteria.

Occasionally virtual teams will face problems they need to solve in which only one or two members of the team have the level of technical knowledge or expertise required to solve the problem. If time is a factor and it is clear that other members of the team could not easily obtain the level of expertise required to make a good decision, then the team may defer the decision to the experts on the team.
In this situation, the entire team can share ideas, perspectives and context for the decision and may be able to participate in developing criteria for the decision. The experts or decision-makers must clearly understand the context and the team's perspective then provide comments about their understanding of the problem. The key to this type of process is communication. The team must convey to the decision-makers (the experts) their expectations and perspective about the decision. The decision-makers in turn must share with the team the processes they use to reach their results and the justification for their decision.

Before a decision can be made it is necessary to understand and clarify the problem. Here are some tools that will assist in this process.
**TOOL | FLOWCHARTING**

**WHAT IS IT?**
Flowcharting provides a pictorial representation of the processes that define the problem and document the essential procedures used. Sometimes referred to as the ‘process map’, a flowchart enables the team to identify problems or ‘disconnects’ that interfere with satisfying the customer. Exhibit 9.1 below represents a simple flowchart. Rectangles are used to indicate tasks or operations, diamonds indicate where decisions are made and a circle is often used to end a process. The arrows represent the flow of the process or materials.

**SAMPLE FLOWCHART**

```
Task → Task → Decision → Task → End

Yes

Task

End
```

**WHY IS IT USED?**
- Used to analyse and understand critical steps in processes.
- Used to identify sources of problems.
- Used to reduce cycle time or to eliminate ‘non-value-added’ activities.
- Used to communicate how the process works.

**WHEN IS IT USED?**
- It is used at the introductory stages of analysing a process.
- It is used to illustrate, explain or pictorially represent the process to others.
- When a process seems too complicated to understand.
HOW IS IT CONSTRUCTED?

- Analyse and identify all of the activities or tasks that are part of the process.
- Determine the decision points in the process.
- Construct the flowchart sequentially. All processes have a start and an end, and contain tasks and decision points (see example).

NEXT STEPS

The flowchart is always a good first step in problem solving. It is the basis for a deeper understanding of the process and helps identify potential problems that will need to be addressed.
WHAT IS IT?
The cause-and-effect diagram is a decision tool that assists the team in determining the possible causes of a problem. It helps the team by identifying and organising the problem’s potential root causes. Its name derives from the method used to construct the model. The problem (effect) is placed to the right of the model, or the end point of the diagram. It is also called a fishbone diagram because the diagram looks like the skeleton of a fish. Exhibit 9.2 illustrates a sample model of the diagram.

WHY IS IT USED?
- It provides a systematic approach to finding the potential causes of an existing problem.
- It helps to clarify difficult problems.
- It helps the team to visualise a variety of problem sources.

WHEN IS IT USED?
- When a problem has been identified and potential causes need to be identified.
- When there is a search for the cause of a particular effect / problem.
- When the impact of the problem is clear but the cause is unidentified.

HOW IS IT USED?
- Start by inserting what the problem is in the spot where the head of the fish would be.
- If you already know the likely main causes, they can be inserted at the ends of the branches.
- Proceed to ask why.

NEXT STEPS
Cause and effect diagrams provide possible causes. The next step requires that the cause, or causes, be validated to ensure that you know what the true problem is. Once the problem has been validated, the next step involves generating solutions to solve the problem.
**TOOL | TREE DIAGRAM**

**WHAT IS IT?**

It is a graphical representation of a complex hierarchical process. Tree diagrams have a wide range of uses. One of the most common applications of the use of a tree diagram is related to implementing a solution, making a change or improving a process. Tree diagrams are also commonly used to define anything that is hierarchical in nature. It follows a structure in which each item other than the first has one predecessor or parent, and one or more successors. Exhibit 6.3 shows an example.

**TYPICAL FRAMEWORK FOR TREE DIAGRAM**

![Tree Diagram Example](Exhibit 9.3)

**WHY IS IT USED?**

- It provides a visual representation of a variety of different complex situations.
- It frames the various steps that lead to the outcome or problem.
- It helps a team visualise antecedents to a problem or solution.

**WHEN IS IT USED?**

- It is used as a planning device to break down a task into units that can be managed and assigned such as goals and steps needed to reach the goals.
- It is used when a solution has been determined and an implementation plan needs to be developed.
- It is used when a problem has been identified and the potential causes need to be determined and investigated.
HOW IS IT USED?

- Identify the problem that needs to be solved or the activity that needs to be further understood or developed. Finding out why becomes our ultimate goal and is at the head of our diagram.
- Determine the next level of major headings. This can be done in a brainstorming session. These headings are added to the tree diagram.
- Create the next set of headings. In our example, this would require that we ask the question why. Our responses are added to the next level of the tree. The process continues until the problem is understood or the process we are working with is well defined.

The tree diagram is a very versatile tool that is often overlooked. Its simplicity in appearance and design helps virtual teams to visualise and frame problems or develop clear plans to implement solutions.
CHOOSING THE BEST DECISION TO IMPLEMENT

Decision-making requires significant preliminary work that begins by identifying and understanding the problem and then finds causes, generates alternative solutions and finally selects which alternative is best. This section focuses on generating alternative solutions and selecting the best one.

The decision process is generally more successful if criteria are developed. This will help ensure that the goal of the decision-making process is met. Four models for choosing the best alternative are presented. All four consider alternatives and evaluate them based upon a set of predetermined criteria. In the Solution Matrix verbal statements that are related to each criterion are identified and recorded. Decisions are made based upon the supporting statements provided for each solution alternative. The Selection Matrix is similar except that numerical values are used to replace verbal arguments.
TOOL | SOLUTION MATRIX

WHAT IS IT?
The solution matrix is a tool that uses qualitative measures to aid in the decision-making process. It establishes criteria that provide structure to the decision-making process. This model identifies criteria and provides a mechanism to discuss verbally the various options under consideration.

WHY IS IT USED?
- It provides structure to the decision-making process.
- It provides rationale for why the decision was made and what factors were considered.
- It provides a basis for agreement.

WHEN IS IT USED?
- It is used to aid a team in making decisions when several alternative solutions have been identified and decision-making criteria have been established.
- It is used when there is some disagreement about what the decision should be.

HOW IS IT USED?
- Determine several solution alternatives that you have evidence will actually solve the problem.
- Develop criteria that you believe should be used to make your decision.
- Generate facts that will affect each of the criteria.
- Make your decision based upon the evidence obtained.

FRAMEWORK FOR SOLUTION MATRIX

<table>
<thead>
<tr>
<th>Options</th>
<th>Criteria #1</th>
<th>Criteria #2</th>
<th>Criteria #3</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</table>

Exhibit 9.4
The strength of the solution matrix is that it structures the decision-making process by providing criteria and a process for assessing them. It takes very little training to use the method and it provides a way for issues related to the decision to be discussed. The weakness is that there is no quantitative way to compare importance or significance of either the criterion used or the contribution that each statement brings to the final decision. The next model, the selection matrix, solves some of these concerns.
WHAT IS IT?
The selection matrix is a decision-making model that builds upon the solution matrix by providing weights for the criteria. This model allows weights of 1 to 5 for each of the criteria, where 5 is the best.

WHY IS IT USED?
- It forces the team to compare options head-to-head using a numerical scale. This requires team members to make a choice about each option.
- It helps clarify the solution decision process.

WHEN IS IT USED?
- It is used when improvement projects are being selected.
- It is used when alternatives are being evaluated.
- It is used when there are no clear choices.
- It is used when personal preferences can affect the weightings.

HOW IS IT USED?
- Determine several problem alternatives in which the need to solve the problem has been validated.
- Develop criteria that you will use to make your decision.
- Compare each problem option head-to-head to determine how well each of the options will perform against the criteria. Ultimately, weights will be established through this comparison. A scale from 1 to 5 is used where 5 is best. See the following section for an illustration of how this can be done.
- Enter the weights in the matrix and add the total for each. The winner is the option with the highest total.

DETERMINING THE WEIGHTS
Consider the situation represented in Table 9.1 below. The team has found five different problems or options that need to be solved. They have also determined two criteria listed across the top. They are: Customer Impact and Need to Improve.

Often a team can reach consensus on the comparison between the different options and can agree on the values to be entered into each slot. The discussion will focus on one criterion until all the entries have been made. Typically, a team begins by determining which option would have the greatest customer impact and then informally comparing all of the options and then assigning values based upon the discussion. Note here that the notion of “customer” should be defined for the particular situation because there may be more than one type of customer and the customer(s) may be internal to the organisation or external to it. When all the values for one criterion are established, the second criterion is considered.
In some cases where a team is unable to determine the weights through discussion, a more systematic approach may be required. A more systematic approach is based on a pair-wise comparison where each option is paired and compared with each of the others. Table 9.2 below provides a record of the comparisons that were made to determine the relative weights assigned to each option, relative to the criterion of Customer Impact. In the two columns on the left, option 1 is first compared with options 2, 3, 4, and 5. Then option 2 is compared with 3, 4, and 5, and so on until all options are compared. The third column provides a record of which option the team selected as the winner. In the fourth column the winners for each option are tallied. In head-to-head comparisons option 4 is the winner and thus should be weighted the highest. Options 2 and 4 are tied and should be given the next highest identical weights.

Note how the head-to-head comparisons identify which options best satisfy a criterion but do not assign weights to the criteria. The team must choose the values. The results of the comparisons in Table 9.2 provide the relative weights for Customer Impact in the Selection Matrix shown in table 9.3.
The same process would need to be completed for Need to Improve. When all the options are completed for each of these categories, the entries are added together and the results are recorded in the last column. At this point, it is a natural reaction to think that this process takes too long and is not necessary. If it is not necessary, it should not be used.

However, forcing the members of the team to compare items head-to-head in this fashion creates a natural environment to discuss the merits of the options under consideration and helps people to understand and commit to the decision they will make.
<table>
<thead>
<tr>
<th>Proposed Solutions</th>
<th>Customer Impact</th>
<th>Need to Improve</th>
<th>Overall Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Option #1</td>
<td>3</td>
<td>4</td>
<td>7</td>
</tr>
<tr>
<td>Option #2</td>
<td>4</td>
<td>4</td>
<td>8</td>
</tr>
<tr>
<td>Option #3</td>
<td>5</td>
<td>2</td>
<td>7</td>
</tr>
<tr>
<td>Option #4</td>
<td>4</td>
<td>5</td>
<td>9*</td>
</tr>
<tr>
<td>Option #5</td>
<td>3</td>
<td>3</td>
<td>6</td>
</tr>
</tbody>
</table>

Options derived by the team

Contribution this option has to customer satisfaction

Difference between current level of performance and the level desired by the customer

Add customer impact and need to improve

*Winner is the highest value in the column.
Different modes of communication include voice, video, computer and face-to-face. The use of the Internet is a very attractive mode of communication for virtual teams. Developing a virtual team website has significant advantages. First, it is available to anyone on the team at anytime in any location where a person has access to the Internet. On the Web, you can link any information to any other information anywhere. It also provides a location for all relevant and newly developed information members may want to share with other members and thus teleconferencing and other modes of communication can be greatly enhanced with everyone having access to the same information almost instantly. Depending on the nature of the information, precautions may be required to keep the information secure. The

**LINKING TECHNOLOGY TO WORK PROCESSES**

- **LOW INTERACTION**
  - Information Sharing
  - Telephone/Voice Mail
  - Email
  - Intranet

- **MODERATE INTERACTION**
  - Brainstorming and Decision Making
  - Audio conference
  - Video conference
  - Electronic bulletin board

- **HIGH INTERACTION**
  - Collaborative Work
  - Electronic meeting system with audio/video and text/graphic (e.g. Netmeeting)
  - Collaborative writing or design tools with audio/video links
GUIDELINES FOR TELEPHONE USE

Although technology provides multiple ways to communicate, the telephone is the medium through which much of our communication takes place. With the use of a mobile phone we are able to contact people wherever they are at any time of day or night. Although everyone uses the telephone on a regular basis, guidelines for when and how phones should be used will help eliminate misunderstandings and maintain a good relationship among team members. Some typical team telephone usage approaches include:

- Equip all team members with a mobile phone with voice mail
- Establish agreements about mobile phone use.
- Reach agreements on phone courtesies such as:
  - Check that it is an ok time to call.
  - Be a good listener.
  - Monitor voice volume.
  - Do not talk while others are speaking.
  - Paraphrase or summarise to validate understanding of the message.
  - Respect time zone differences
- Establish voice mail protocols such as identify caller, preferred times to call,
- Link e-mail with phone use where possible. This is particularly useful if everyone would benefit from having a specific document to refer to.
- When complex issues arise and need to be addressed use the phone as a way to set up face-to-face times for all involved.

GUIDELINES FOR E-MAIL USE

The use of e-mail has proven to be quite effective. At the same time, it can be overwhelming in terms of the number of messages that need to be processed on a daily basis. Friends, relatives, co-workers, advertisers and many other sources simply overwhelm all of us with volumes of e-mail. Generally e-mail should be used for communication situations to deal with items that are not urgent and interaction is not required. Suggestions for the use of e-mail are provided to better manage and to effectively use this useful tool.
SUGGESTIONS TO MANAGE AND USE E-MAIL

- Develop a no scroll rule. All messages should be readable on one screen without additional scrolling.
- Use the description line well to frame the content and significance of the message.
- Treat people electronically the same way you would treat them in person
- E-mail is not normally appropriate for urgent messages
- Develop a prioritisation code placed on the top of the message. A simple example would be to state one of the following: requires action or F.Y.I.
- Agree to a no spam rule.

GUIDELINES FOR TELECONFERENCING

Teleconferencing may not be as good as face-to-face interaction but it is the most commonly used medium for virtual teams to meet. Teleconferencing has the potential to minimise the need to meet face-to-face. However, there are several important steps that need to be taken to help make teleconferencing a success.

- Teleconferences require more planning than regular meetings. The rules that are normally used to ensure that meetings are successful must be followed. An agenda with a completed PAL is the place to start. The agenda and all documents being generated by meeting participants for this teleconference must be shared ahead of time so that team members are familiar with the documents and are equipped to contribute. Additionally, the agenda should specify the documents each member should have when the teleconference starts. Having members wait while others look for their copies becomes disruptive and can be frustrating. A possible way to avoid this problem is to have a team website containing all the required information that all members can access at the time of the teleconference.

- Assign meeting roles for each meeting. These would include at a minimum, a scribe and a leader. Many successful virtual teams have a gatekeeper whose primary task is to monitor participation so that the gate will be open for those who have not participated very much and may be closed to those who may have dominated the talk time to this point. A gatekeeper will actively seek input from all members of the committee.

- Use people’s names. A recommend procedure would be to have each person introduce themselves at the start of the meeting and to agree that each time they speak they will identify themselves so there may be less confusion about who has said what. In addition, besides saying things like “Mary, what do you think?” it is also helpful to say things such as “to your point John, I think that...”. The process of using names may initially seem tedious because our conversations are normally with one person, but the effort clearly pays off in shared understanding and clearer results.
COLLABORATIVE TEAM SOFTWARE

Software has been developed for a wide number of uses with virtual teams. Software exists for tracking team process, decision-making, reaching consensus, sharing information, conducting meetings and many other team-related activities. The future will undoubtedly bring even more software applications as well as revisions and updates to existing software. The decision to use software for a specific purpose by a team will depend on factors such as the type of project, length of the project, complexity of the project and the interest and willingness of the team members to become trained to use the software. Several software applications that are specifically suited for small team use can be found at the following Internet sites:

- www.groove.net
- www.teamdirection.com
- www.pioneerspirit.com
In today's fast changing business world, products come and go much more rapidly than in the past. The development of new ideas for products or services or for major redesigns to existing processes provides a significant competitive advantage. Having creative ideas is vital but implementing the ideas on time is perhaps more important. Implementing a good idea is more useful than having an even better idea that you cannot implement. Because the need to implement is a part of every great idea, the capability to implement becomes a vital competitive advantage to an organisation.

Implementation is also critical to the success of every quality improvement process or process redesign project. The great solutions to problems that virtual teams generate are important and valuable only if the change can be implemented. Virtual teams may be involved in developing new ideas for products or services as well as improving processes. Although the approach to implementation is very similar whether we discuss products or processes, the examples provided here will focus on improving processes.

Successful implementation begins with selecting the right project and continues through until the solution is implemented. The problem to be solved must be clearly linked to the organisational vision and the stakeholders must view the solution of the problem as an important activity that moves the organisation in the direction of the vision. Thus, once the right problem has been selected, maintaining stakeholder support from start to finish is necessary.

The success or failure of the implementation process may already be determined by the time that team decisions about what to change have been made. Most improvement virtual teams tend to go rather smoothly through most of the abstract steps – identifying a problem, understanding the situation, determining root causes, finding countermeasures, selecting the one most appropriate – only to then struggle when it comes to implementing the recommended changes. Much of the earlier work is hypothetical; implementation is real and immediate. However, if the improvement team has done its work carefully throughout each phase, and kept key stakeholders informed, they would have generated significant support for the implementation of their improvements. If the right problem has been solved and the processes used and the decisions made have all been documented and supported, there is significant evidence to support the proposed improvement. In addition, if the right people from the right areas and departments have been involved, there is broad support and implementation can proceed.

Since the time required to complete a project may span several months or more, both institutional and individual memories regarding the importance of the project will likely deteriorate. For this reason, it becomes important to revisit the decision that led to the formation of the team to solve a particular problem. This can be done by re-establishing what the threats associated with not solving the problem are, and what the opportunities or benefits of solving the problem are.
The process of re-establishing the threats/losses if the problem is not solved and the opportunities/gains from solving the problem brings everyone including the stakeholders in touch with and aware of the need to solve the problem. This realisation can also be accomplished by completing a Best Practices Report. This report identifies the improvement project, the findings of the study including the best practices of other organisations, the existing performance gap and the project performance advantage that will occur with the implementation of the recommended improvements.

Despite efforts to keep people aware of the benefits of resolving a particular problem, most projects encounter some type of resistance along the way. Resistance to decisions can take many forms. If a change is anticipated, it is particularly useful to clarify why the change is needed and what the benefits are. Stakeholders may have committed to solving the problem but it may require periodic involvement to maintain the commitment.

Successful virtual teams bring stakeholders with them as they progress in their projects. One approach to manage the resistance is to develop a stakeholder analysis matrix.
**TOOL | STAKEHOLDER ANALYSIS MATRIX**

**WHAT IS IT?**
The Stakeholder Analysis Matrix is a process that identifies the level of support available from key stakeholders. It identifies the type of resistance the implementation process will face and allows the team to anticipate ways to manage the implementation more smoothly.

**WHY IS IT USED?**
- It is used to determine the level of support available for implementing a change within the organisation.
- It is used to identify the concerns or issues that key stakeholders may have and that need to be addressed in order to implement a change.

**WHEN IS IT USED?**
- It is used whenever an implementation will require change in how work is done.
- It is used before the implementation begins.

**HOW IS IT USED?**
- Determine the key stakeholders important to implementing a change.
- Select a process to gather information from the members of the stakeholder group. Information may be gathered one-on-one where a member of the team meets with the stakeholder, or, the entire team may choose to be present. Additionally, surveys, and or observations of stakeholder behaviour or conversations may be used to gather information.
- Ask each stakeholder to express his or her concerns about implementation. The responsible person(s) should also identify their interpretation of the level of resistance presented by the stakeholder. The matrix in Table 10.1 provides an example.
### Table 9.1

<table>
<thead>
<tr>
<th>Type of Resistance</th>
<th>Level of Resistance*</th>
<th>Type of Contact (T, I, S, O)**</th>
<th>Issues or Reasons for Resistance</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>Political</td>
<td>H</td>
<td>T, O</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Does not want to change. There is no benefit for them.</td>
</tr>
<tr>
<td>B</td>
<td>Organisational</td>
<td>M</td>
<td>TI</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Thinks the change will minimise the role of their department.</td>
</tr>
<tr>
<td>C</td>
<td>Technical</td>
<td>L</td>
<td>I, O</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>The use of computer/technology makes them anxious</td>
</tr>
</tbody>
</table>

* H-High, M-Medium, L-Low, N-None

** Identifies how the information was gathered. T-Team, I-Individual, O- Observation, S-Survey

The information provided in Table 9.1 helps to determine the concerns of the stakeholders as well as the significance of the resistance and identifies how the information was gathered. With this information, the team then develops a response that will deal effectively with the concerns of each stakeholder. This process leads to the development of the Stakeholder Resistance/Response Matrix.
**TOOL | STAKEHOLDER RESISTANCE/RESPONSE MATRIX**

**WHAT IS IT?**
The Stakeholder Resistance/Response matrix is a process designed to overcome the concerns and resistance of key stakeholders. It requires the team to specifically focus on strategies for helping stakeholders cope with the implementation in a positive fashion.

**WHY IS IT USED?**
- It is used to develop support for the implementation process.
- It is used to show the level of support that has been developed by key stakeholders.
- It is used to keep the stakeholders informed.

**WHEN IS IT USED?**
- It is used early in the process of identifying a solution and after the solution has been identified when the team is preparing for implementation.
- It is used when support from stakeholders is essential for successful implementation.

**HOW IS IT USED?**
- Based upon the output of the stakeholder analysis matrix the team addresses the concerns of each stakeholder. The team decides the type of response required in the form of recommended action and the type of contact (individual or entire team) that is best suited for the situation.
- During the meetings with the stakeholder, the team members share their rationale about the decisions they have made, how these decisions will benefit the stakeholder and the plans for implementation. Input and recommendations are sought from the stakeholder regarding the proposed solution and the implementation process.
- The team considers input from the stakeholder, takes appropriate action, and changes as required.
## Stakeholder Resistance/Response Matrix

<table>
<thead>
<tr>
<th>Stakeholder</th>
<th>Type of Contact</th>
<th>Recommended Action</th>
<th>Action Taken/ Changes Made</th>
<th>Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bill – Division Leader</td>
<td>Team Meeting</td>
<td>Establish the need for change. Share what he will gain. Seek further recommendations from Bill.</td>
<td>Meeting with Bill clarified the benefits for him and his recommendations were included.</td>
<td>Bill was supportive</td>
</tr>
<tr>
<td>Elaine – Department Head</td>
<td>Team Meeting</td>
<td>Clarify the role her department will play. Identify the importance to the success of the organisation.</td>
<td>Meeting with Elaine helped her realign her goals with the organisation and allowed Elaine to share her concerns.</td>
<td>Elaine agrees not to oppose the project or its implementation.</td>
</tr>
<tr>
<td>George – Human Resources Coordinator</td>
<td>Individual (Amy)</td>
<td>Share information about the processes. Involve George in the process. Educate.</td>
<td>George became more comfortable with the project once he became involved, asked questions and became aware of the advantages of completing the project.</td>
<td>George was a strong supporter.</td>
</tr>
</tbody>
</table>
The matrix in Table 9.2 shows the plan the team developed to meet with each stakeholder and discuss their reservations about providing support for the project and also to fully explain the advantages to the stakeholder for advancing the project. A specific plan for each stakeholder is devised including who will meet with the stakeholder and the issues that need to be resolved. The matrix also shows the results of the meeting and the action, including changes that will be undertaken because of the meetings. The matrix also shows the extent to which the stakeholders are involved. When support has been obtained the project can move forward. The likely next step for most projects is to develop a pilot.

DEVELOPING A PILOT

In many environments, it is important to pilot the improved process. The nature and complexity of the pilot depends upon the project. The pilot might be a small-scale version of the process or it may be a full-scale test applied to a segment of the system. Small changes that may be part of an existing improvement effort may not need a pilot because the success or failure of the improvements may be immediate or obvious. However changes resulting from benchmarking studies or process redesign efforts are generally beneficial and should include a pilot.

Pilots provide other advantages as well. When there is scepticism about proposed changes, a single successful implementation in one part of the system can have a powerful influence on the thinking of those who had previously questioned the wisdom of the changes.

The pilot must be undertaken with the same care as for the complete implementation. Care is needed to have many perspectives on the specifics about what must be done, where it fits in the sequence of tasks, how long it will take, and what is needed to complete the task in terms of materials, equipment, employee time, and other resources. The process can be done from start-to-finish or from finish-to-start. In either case, a time line is developed and the tasks are sequenced. A Gantt Chart may be useful at this point.

The output of these activities is the identification of four key elements: **What**, **How**, **When**, and **Who**. **What** identifies the specific action item or task that must be done. **How** includes resources, personnel, equipment and materials that are required. **Who** identifies the person who has responsibility for each item or each action that must be taken. **When** specifies the expected completion time as well as any major milestones that will need to be accomplished. After the pilot has been completed, modifications to these plans for the full project should be made to reflect what was learned from the pilot.

In order to demonstrate the use of How, Who, When and What, an action plan to prepare for a presentation is provided in Table 9.3. This table also includes a completion date for the activity. The number of activities may be very few as Table 9.3 indicates, or it may be very many as the project becomes more complex. Table 9.3 is constructed by listing the activities in the first column of the table in the order that they need to be completed. Once the action item is determined, the remaining columns can also be completed.
### ACTION PLAN

<table>
<thead>
<tr>
<th>Action to be taken (What)</th>
<th>Resources (How)</th>
<th>Responsibility (Who is in charge)</th>
<th>Start date (When it starts)</th>
<th>Completion Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Determine the content</td>
<td>Team Decision</td>
<td>Team Leader</td>
<td>October 1</td>
<td>October 3</td>
</tr>
<tr>
<td>2. Develop PowerPoint Slides</td>
<td>George’s Computer</td>
<td>George</td>
<td>October 3</td>
<td>October 5</td>
</tr>
<tr>
<td>3. Prepare Presentation</td>
<td>Amy, Ann and Bill</td>
<td>Amy</td>
<td>October 5</td>
<td>October 6</td>
</tr>
<tr>
<td>4. Rehearse Presentation</td>
<td>Team</td>
<td>Ann</td>
<td>October 6</td>
<td>October 6</td>
</tr>
<tr>
<td>5. Prepare Executive summary</td>
<td>Team</td>
<td>Bill</td>
<td>October 6</td>
<td>October 6</td>
</tr>
</tbody>
</table>

When an action plan has been created the team needs to anticipate potential problems that may occur and determine possible responses for those problems. The process requires a structure so that a thorough analysis can occur. The Gantt Chart in Table 9.4 is also useful to see the time involved and the sequence of activities involved.
When virtual teams become pro-active and anticipate problems, or when potential problems are exposed, the team, and possibly the organisation, must decide the course of action they wish to take. The team may choose to:

- Prevent the problem from occurring through a specific counter-measure.
- Choose to wait until the problem occurs and then respond with an anticipated plan that will deal with the problem.
- Choose to take actions that may minimise the likelihood of the event occurring.

Identification of the types of things that can go wrong is the first step. Several tools can help provide structure and simplify the implementation process. A combination of the tree diagram and the process decision program chart (PDPC) are both quite useful in mapping out and in determining likely implementation problems before they actually occur. The use of the tree diagram was shown is Section 9. Although we will use both the tree diagram and the process decision program chart (PDPC) in the example that follows, this section will focus on the use of the PDPC.
Tool | Process Decision Program Chart (PDPC)

**What is it?**
PDPC is a management and planning tool that assists in developing an implementation plan. It provides a model of steps in the implementation and possible things that can go wrong. It serves as an analytical planning tool to help implementation run more smoothly.

**Why is it used?**
- It maps out conceivable events and contingencies for the factors that may affect the implementation process.
- It anticipates problems before they occur, thus preventing the problem from occurring or influencing the implementation process.
- It can be used to focus on one area such as the identification of risks associated with the implementation proves.
- It identifies feasible countermeasures in response to these problems.

**When is it used?**
- The PDPC is used in the planning phase of the implementation process.
- It is used when a team has to be meticulous in assuring effective implementation.

**How is it used?**
- Assemble those people familiar with the processes and activities being proposed. The people involved should include high-level managers as well as those with the specific knowledge or expertise required to be able to anticipate problems.
- Determine the specific goal of the process (identify risks, anticipating mistakes, determining what might go wrong, etc.).
- Using the proposed action plan, develop a tree diagram of the various levels of detail required to implement the plan.
- Using the highest level of detail, the bottom branches on the tree, identify the activities where problems may occur. In the example that follows, the goal was to anticipate potential problem areas and correct them. The process can often be facilitated by asking the question “What if” or “What could go wrong?” Brainstorming may also be used to explore potential concerns.
- After creating this list it is necessary to determine which of these are valid and require a response. The responses can be viewed as solutions to the important items that might go wrong.

The PDPC model can then be designed so that it clearly lays out the implementation key phases, the possible roadblocks, and the actions that may neutralise each roadblock. Exhibit 10.2 is a PDPC model which might be used in helping members in a team project more effectively implement their final presentation.
SAMPLE PDP CHART

Exhibit 9.1

DETERMINE CONTENT

Develop Pres. Slides

Prepare Presentation

Write Executive Summary

Select
Graphics
Fonts
Content
etc.

Identify
Audience
Rationale
Recommendation

Determine
Format
Content

WHAT IF? WHAT CAN GO WRONG?

Forget Disk / Computer Fails

Audience Changes

Forget Summary

SOLUTIONS

Make transparencies

Check/control list
of those invited

Provide a backup
for a team member
Virtual teams do not progress towards efficient operation in a smooth and continuous manner. Even when following all of the guidelines in this book, it is inevitable in real-life that things will go wrong. Successful team building is complex and even with carefully selection of team members, planning of projects and use of the tools described here there may always be unexpected challenges in accomplishing goals successfully. How can team members or team sponsors diagnose problems and re-direct their virtual teams toward high performance? The tools addressed in this section frame some useful and efficient methods for re-energising virtual teams. Understanding the typical development of a team can be helpful in determining when an intervention is necessary.

UNDERSTANDING THE STAGES OF TEAM DEVELOPMENT

The fragility of team momentum can be exhausting. At one meeting, the team can be fully focused and making energetic progress; by the next week’s meeting, a new piece of information that was not present before may add another dimension to the task. An understanding of the typical patterns in team development is useful for anticipating, diagnosing, and not overreacting to apparent team setbacks. Work groups usually evolve through four stages along the way to reaching their goals (Tuckman, 1965; Tuckman & Jensen, 1977): forming, storming, norming, and performing. Because modern work groups attempting to become virtual teams often are also temporary groups, they also eventually reach a fifth stage: adjournment.

In the forming stage, team members do not yet know or trust each other well enough to begin moving toward the team goal. The work of the team is to get acquainted, understand each other’s skills and experience, and start the process of building personal and professional relationships. Therefore, little time is focused directly on the work.

As the team members begin to share their individual differences and their perspectives, the second stage of storming usually arises because differences in style, work experience, background, and framing the work require methods of conflict resolution before the team can begin to work effectively together. When team members find that they are not all from the same functional area, the same intellectual background, or the same ethnic background, the natural tendency is for their differences to seem more dominant than their similarities.

As the team members begin to find ways to understand each other’s differences and individual strengths as well as to build agreements about how to work together, the team moves into the norming stage. Only after the team has developed some acceptable shared norms about how to do the work and how to effectively respect each other’s contributions can the team begin to experience the trust that is essential before the team can actually move to the fourth stage.
Once the team members understand each other enough to feel comfortable working together, the team can begin to focus much more of its meeting time, and time away from meetings, doing the outcome focused tasks that will eventually achieve the team’s charge. In the performing stage, the team is focused on task accomplishment. As a temporary team reaches its performance goal, prepares its final report, and submits its implementation suggestions to the team sponsor, the team will either a) begin to frame a new charge, if it is a permanent team; or b) begin the preparation to adjourn the team.

**WHY IS KNOWING THE TYPICAL PATTERN OF TEAM DEVELOPMENT HELPFUL?**

When a team appears to be having trouble progressing, an appropriate question is “What stage of development is the team in currently?” Having team members identify where they think they are along the development phases can be helpful at shaping the kind of intervention or problem resolution that is used. If the team is in the initial forming phase, a useful intervention is to make sure that all of the important forming activities are actually experienced. If the team has been progressing effectively through the team development stages, and some factor slows the team down or prohibits the team from finishing their work, the solution may require a more specific focused intervention.
### TYPICAL TEAM PERFORMANCE PROBLEMS AND HARMs TO TEAM EFFECTIVENESS

<table>
<thead>
<tr>
<th>Internal Team Issues:</th>
<th>Possible Harms to Team:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Interpersonal conflict among team members</td>
<td>Team not focused on the task</td>
</tr>
<tr>
<td>Too much agreement/similarity/cohesiveness</td>
<td>Team comfortable with mediocre solutions</td>
</tr>
<tr>
<td>Because the responsibility is shared individuals take less responsibility</td>
<td>Team makes riskier decisions</td>
</tr>
<tr>
<td>Lack of internal leadership, formal or informal</td>
<td>Team flounders</td>
</tr>
<tr>
<td>Individual team members who are too dominant or too reticent</td>
<td>Not all team members are involved</td>
</tr>
<tr>
<td>Team reaches impasse either in decision making or in personal conflicts</td>
<td>Stalemate in team’s progress</td>
</tr>
<tr>
<td>Too much critique, blaming</td>
<td>Distrust and lack of confidence within team</td>
</tr>
<tr>
<td>Unproductive team meetings</td>
<td>Team members become uninterested, frustrated</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Team Sponsor Issues:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>The sponsor’s charge is unclear</td>
<td>Team confused about direction</td>
</tr>
<tr>
<td>The sponsor fails to facilitate team-building</td>
<td>Team members act as individuals</td>
</tr>
<tr>
<td>The team sponsor focuses only on the task and ignores team process issues</td>
<td>Competition between team members emerges</td>
</tr>
<tr>
<td>The team sponsor alters the deadlines or team’s charge</td>
<td>Team members are frustrated or anxious</td>
</tr>
<tr>
<td>The team sponsor punishes mistakes/errors, thus not allowing for team learning</td>
<td>Team members lose confidence, become bitter</td>
</tr>
<tr>
<td>Team sponsor is unavailable to answer guidance questions</td>
<td>Team members lose focus, their task is unclear</td>
</tr>
<tr>
<td>Team sponsor has asked a team to do work which does not require a team</td>
<td>Team members act independently / gaps in quality</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Organisational Issues:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Structure not supportive of virtual teams</td>
<td>Team exhausted from working around the system</td>
</tr>
<tr>
<td>Reward system rewards only individual performance</td>
<td>No cooperation among members</td>
</tr>
<tr>
<td>Project is counter to organisational culture</td>
<td>Team members hesitate to try new methods</td>
</tr>
<tr>
<td>Many virtual teams with no system of interface</td>
<td>Duplication of efforts, competition among virtual teams</td>
</tr>
</tbody>
</table>
The number of things that can go wrong is extensive and possibly endless. Trying to anticipate all the problems that could happen may be less helpful than trying to find a general set of tools which can help the diagnosis of problems and offer team improvements. The remainder of this section addresses some empowering methods for helping virtual teams move forward. The first three tools, ‘A-B-C Diagnosis’, ‘Barriers and Aids Analysis’, and ‘Team History Time Line’ can be initiated by the team members, the team leader or by a team sponsor.
WHAT IS IT?
The A-B-C diagnosis is a method of identifying the antecedents, behaviour, and consequences surrounding a team’s problem. It is a self-evaluation tool that allows the team to diagnose and solve progress problems by thinking about the team’s context and work processes.

WHY IS IT USED?
- It helps pinpoint the source of a team’s problem.
- It provides a simple framework for thinking about team’s problems.
- It may help for considering the timing and placement of a solution to a team’s problem.

WHEN IS IT USED?
- It is used when team members recognise that they have reached a block in progress.
- It is used when the team is uncertain of the source of a problem.
- It is used when the team needs to explore earlier actions to understand a current stagnation.

HOW IS IT USED?
Materials: Copy of the team charter, copies of an A-B-C form, copies of team agendas and team reports.

Instructions: Each team member receives one or more copies of the team A-B-C form below. Each team member is asked to record the progress problem that they believe is responsible for the team’s slow progress. If the team member believes there are several overall causes, they can use as many separate forms as needed for each separate problem. Note that this initial A-B-C identification can be done either in a team meeting or ahead of time and submitted for consideration before the team meeting.
Process for Sharing: The team sponsor, an outside facilitator or a member of the team organises the information obtained into a manageable form for all the team members to see. In a face-to-face meeting or videoconference, team members address each of the problems and the antecedents, behaviours, and consequences. Two key practices are needed to make the process effective. Firstly, no person can rebut another person. Secondly, each person must address only what they will do differently to improve the progress of the team. Thus problems are identified and each individual takes some responsibility, whether or not they started the problem, and team goals are set for reviewing progress within a reasonable time (two weeks or one month may be a reasonable timetable).
**Example – ABC Analysis**

Progress Problem: Team missed the deadline for the first deliverable to the team sponsor.

<table>
<thead>
<tr>
<th>Antecedents</th>
<th>Behaviours</th>
<th>Consequences</th>
</tr>
</thead>
<tbody>
<tr>
<td>I didn’t know the deadline.</td>
<td>I didn’t finish my part of the data analysis on time.</td>
<td>Other team members who were counting on my data analysis could not do their work on time.</td>
</tr>
<tr>
<td>Several team members arrive late to most meetings</td>
<td></td>
<td>Team members don’t know what their roles and responsibilities are for the next meeting.</td>
</tr>
<tr>
<td>Recorder of last meeting didn’t complete the minutes or report in time for team members to plan.</td>
<td>Previous meeting reports arrive by e-mail on the day of the meeting.</td>
<td>Team members feel like they have an excuse for not being prepared or on time.</td>
</tr>
</tbody>
</table>

Usually, identifying the antecedents, behaviours, and consequences of team progress problems raises the awareness of team members’ interdependence upon each other. Team members can often then identify where they can personally take responsibility for team progress. Looking at the behaviours and their antecedents and consequences tends to lead to action.
**WHAT IS IT?**

A ‘barriers and aids’ analysis is a method of identifying and pinpointing factors that block the effectiveness of the team in making progress toward its goal. It borrows its comparative method from approaches like force field analysis, push-pull analysis, and SWOT (strength, weaknesses, opportunities, threats) analysis.

**WHY IS IT USED?**

- It helps a team focus on its progress by identifying barriers and aids to progress.
- It helps identify ways the team can overcome barriers and capitalise on the aids.
- It helps virtual teams frame the context in which they must make progress.

**WHEN IS IT USED?**

- When a team is bogged down but has no consensus on the causes.
- When a team is partially successful and partially unsuccessfully.
- When a team is frustrated by inconsistent or sporadic problems.

**HOW IS IT USED?**

**Materials:** Flip chart and markers or multiple copies of Barriers and Aids Analysis Form illustrated in Exhibit 10.3 below. This form can be expanded to any length depending on the number of team goals and the number of barriers and aids for each team goal that is not being met.

**BARRIERS AND AIDS ANALYSIS FORM**

<table>
<thead>
<tr>
<th>Team Progress Goal</th>
<th>Barriers</th>
<th>Aids</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Instructions:** Using brainstorming methods identify the team goals that are not being met. Then identify as many barriers to the goals as can be generated by the team. List all of the barriers in the column beside the goal. Then identify and list as many existing aids toward the goal as possible. Remember that the aids are not dreams but realities that can be used to help the team move forward. Therefore, identifying truly useful aids that already exist can be empowering to the team and help them move forward. It may be helpful to focus on at least the three following categories to generate barriers and aids: people (their skills, attitudes, distractions), facilities (equipment, resources, technology), and environment (structure of the setting, culture, social, physical issues). Exhibit 10.4 provides an example of how barriers and aids to a team’s goal accomplishment might appear.
### Example – Barriers and Aids Analysis

<table>
<thead>
<tr>
<th>Team Progress Goal</th>
<th>Barriers</th>
<th>Aids</th>
</tr>
</thead>
<tbody>
<tr>
<td>All team members arrive at team meetings on time.</td>
<td>No agenda sent in advance.</td>
<td>Team charter agreed upon.</td>
</tr>
<tr>
<td></td>
<td>Team members’ old habits.</td>
<td>Team members care about team task.</td>
</tr>
<tr>
<td></td>
<td>No one reads the charter.</td>
<td>Team sponsor is respected.</td>
</tr>
<tr>
<td></td>
<td>No team training occurred.</td>
<td>Team members are skilled.</td>
</tr>
<tr>
<td></td>
<td>No deadline for project.</td>
<td></td>
</tr>
<tr>
<td>Team focuses on analysis not just brainstorming.</td>
<td>Team members like creativity.</td>
<td>Team analytical tools are simple to learn.</td>
</tr>
<tr>
<td></td>
<td>Team members dislike detail.</td>
<td>Using visual analytical tools can be creative.</td>
</tr>
<tr>
<td></td>
<td>Team members not trained in using analytical tools.</td>
<td>Using the tools allows for more solutions.</td>
</tr>
<tr>
<td>Timely completion of task is critical.</td>
<td>No project plan developed by team.</td>
<td>Team will be rewarded based on the quality of its solutions.</td>
</tr>
<tr>
<td></td>
<td>Team uninformed about the reasons for the team project.</td>
<td></td>
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<tr>
<td></td>
<td>Team members are already overworked.</td>
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<tr>
<td></td>
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<td>Team sponsor can offer incentives for early completion.</td>
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<tr>
<td></td>
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<td>Team individuals have high personal performance goals.</td>
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<tr>
<td></td>
<td></td>
<td>Some tasks can be performed outside of team meetings.</td>
</tr>
</tbody>
</table>

Try to identify aids that can overcome or neutralise the barriers. If there are no aids for some barriers, generate action steps to overcome the barriers. These steps should form an action plan. If there are many barriers that do not have counterbalancing aids, then several different plans may be needed to overcome all the barriers. The goal is to find ways to remove obstacles, whether the obstacles are attitudinal, structural, skills-based, or simply due to lack of information.
**Tool | Team History Timeline**

**What is it?**
A team history timeline is a visual tool that captures the key incidents, processes, or events in a team’s history. It displays the team’s history so that they can analyse their current situation within a broad context.

**Why is it used?**
When virtual teams are bogged down, they often focus on the current issues or the future, but their previous decisions and practices have brought them to their current situation. Therefore, it helps them frame the progress issues in a context, which they created and they can change.

**When is it used?**
- When a team is unsure of how it got into its current, stagnant position.
- When team members are ready to try and move forward but do not want to repeat past mistakes.
- When a team is trying to improve its energy and get better focus on the goals.

**How is it used?**

**Materials:** Newsprint, large flipchart, or poster board and markers.

**Instructions:** Before the meeting, a team member, the team leader, or the team’s sponsor prepares a timeline beginning with the date the team was formed. Reasonable monthly or weekly dates may be indicated in advance. The person responsible may wish to prepare a large newsprint that highlights a few key dates or events, but it may also be a good idea to let the team members identify those dates for themselves. It is, after all, the team’s progress and the team’s empowerment we are seeking by this review. An example is provided in Exhibit 10.5.
To prepare team members for the meeting, ask team members to think about critical events, meetings, actions that occurred in the team or in the organisation and to think about whether those factors resulted in a positive or a negative for the team’s progress.

In the team meeting, place the newsprint timeline on the wall and ask individuals to write in key events and dates and to place them above or below the timeline based on how positive or negative they were for the team’s goal achievement. If an event is viewed by some members as positive and by others as negative, list that event on a separate sheet. When all team members have identified the important historical factors, any items that are listed on the separate sheet should then be addressed individually through dialogue and a consensus reached about the positive or negative impact of the factor.

The dialogue can generate specific thoughts about those events that derailed the team. By clarifying the impact of different factors, the team can begin to create a strategy to overcome that setback. The team can review the steps that lead to the setback, can agree ways to redirect the team’s processes and actions, and can find common-ground around actions that will neutralise the negative event and move them forward.

Save the newsprint then have the team review and add to the time line in about a month to learn whether the team’s new strategies are beginning to help the team move further toward its goal. If the team members still identify the situation negatively, reconsider strategies for improving team productivity.