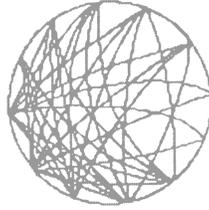

CHAPTER 10



LAUNCH

Do It Yourself

This chapter focuses on how to launch your virtual team, increasing its speed, productivity, and “group intelligence.”

*A virtual team must be smarter than a colocated team—
just to survive.*

Here we present the key ideas in this book as activities. Follow this journey and you will practice the virtual team principles described in the preceding chapters.

Traditional planning is a serial process: People start at the beginning, arrive at a fixed plan, and then go to work. Awash in the flux and chaos of change, the method by which a virtual team takes form is not linear. It cycles through a series of ever-better rapid prototypes of itself. The team does a mental self-mock-up as it starts, then refines it over time. Ironically, Internet speed requires more, not fewer, planning orbits. Short, effective planning sessions early in the life of a virtual team establish good habits, requiring discipline that many creative people naturally resist. But it pays off for virtual teams.

Your Journey

To get the most out of this chapter, stop right here and conjure up a real or imaginary virtual team. It can be any team that you're familiar with—the most successful team project you've ever been on, the team you're on right now, or a team you'd like to design.

We invite you and your imagined group to come along on a journey that will launch your team in a *turbo session* that kicks off your work together.

Apply your own experience as you read. Employ the steps to evaluate what worked in the past and/or as a checklist to start up and launch a new team. Ideas translate into real data that the team gathers about itself and its work, guiding it as it goes through its launch. Mentally enter information or check off items (for example, “We wrote down our purpose,” or “Karl, Kee, and Keith are team members”). Use question marks where it's not clear how this applies to your example. Leave blanks for missing pieces.

As you accumulate a picture of your team and its work, you generate a database profile unique to your team. Your particular details of people, purpose, links, and time constitute a shared mental model that you can express in technology. Launch your team in seven steps:

1. Create identity.
2. Draft mission.
3. Determine milestones.
4. Set goals.
5. Identify members.
6. Establish relationships.
7. Choose media.

You can use these seven steps to meet differing launch needs:

- For a *simple team* with a short time frame, these steps may be all you need. A quick launch like this may be enough to create trust and a “back-of-the-envelope” plan.
- For a more *complex team*, the steps provide an early planning loop to generate scope, define frameworks, and make long-lead-time decisions. This early model makes later detailed planning more effective and faster.

- *Subteams* inside complex multilevel teams often can make do with this basic launch.

To succeed, the launch must involve the key people responsible for implementation and results, including sponsors. Participatory planning is a powerful way to achieve early virtual team alignment. This is the moment for a sponsor to make a lasting contribution and set up the team for success.

The creation of the first rough virtual team plan is a powerful, shared experience. Connect early and often. From your very first conversations, be conscious of how much the process is a mix of face-to-face, virtual real-time (synchronous, like phone), and non-real-time exchanges (asynchronous, like e-mail).

Remember, face-to-face is the fastest way to build trust, crucial in the early phases of virtual team life. If face-to-face meetings are too costly, do the next best thing and invest in telephone or videoconference (synchronous) meetings or same-time web-based interactive technologies. Use as many interactive media as the team can handle. And if you are too global to find same-time windows easily, learn how to hold asynchronous events using fast-cycle online discussion forums and conferences.

Go digital wherever possible and as soon as possible. As you head into the cycles of planning, use the technologies that will make your virtual team successful when it's up and running.

Now is the time to introduce new technologies and consider major changes! Encourage change and experimentation early and discourage it later.

Your virtual team is like an architectural sketch. Keep drawing it, cycling through, asking yourself questions until the model of your team meets these requirements: Is its purpose simple enough to recite in a sentence or two? Can you draw a picture of the organization for other people? Does it pass the gut test? Do you feel that the project is doable?

Seven Steps

Any successful virtual team must answer seven questions. As you move through this thought experiment and linear book format, remember that all these activities happen simultaneously even as the logic of the journey unfolds as a one-after-the-other series of steps.

Teams entwine social and task systems. In this launch scenario, task takes the lead, but the underlying social system is also being generated. While you focus on goals, you forge alignment through participatory processes where members seek shared understanding. When you map relationships at the intersection of people and purpose, you also establish the leadership structure.

Ultimately, it is a healthy social system that enables a task-oriented team's success in working across boundaries.

Step 1: Create Identity

How does a virtual team begin? People with an idea start talking, and soon a new virtual team is on its way to formation. Regardless of how it begins, a team grows as *people* with shared *purpose link* over *time*.

“We” marks the moment when a team becomes real. Sometimes an ineffable “click” is felt, or a satisfying “plunk”¹ is heard. This team consciousness usually dawns in the turbulent launch phase of its life cycle. The need to create team identity, however, begins with the first strands of relationships that emanate from a shared idea.

A team's name symbolizes its identity, its smallest mental model: Alpha, BagelNet, Calypso. Names may be wild creative expressions of mission or merely descriptive tags. A team often begins with a temporary nickname as an agreed-upon placeholder for a “real” name to come when the purpose is better understood.

Your name labels your team. Consider a formal name that clearly communicates what the team is about—for example, SunRevenues, Sun's web-available financial reporting system team. Then nickname the team or make it an acronym: SunREVs. (See Figure 10.1.)

Virtual teams often require an officially registered identity as well. While colocated teams get their reality by physical presence, virtual teams have to

Figure 10.1 Name



stake out shared electronic space. Many organizations acknowledge the existence of a new virtual team with accounting codes, login lists, and web sites. At companies like Sun and GE where virtual teams are formal parts of the system, corporate support and electronic privileges require the filing of charter documents. For a start-up, incorporation is an early significant event, often marking the team's official beginning.

Step 2: Draft Mission

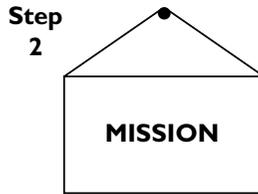
Rule number 1 of every team is to get the purpose right early and review it often. This exercise is at once more important and more difficult for virtual teams. Even when it receives its purpose as an explicit charter from above, a team must do the hard work of interpreting and expressing the mission in its own words. Functioning with far less oversight than is customary for a traditional team, everyone on a virtual team must understand and agree with the purpose.

Writing a vision or mission statement has become a joke to many. If the exercise stops there, chuckle on. However, when setting purpose becomes the basis for the group's work, it is a powerful source of energy.

We cannot overstate the value of a virtual team cycling through its purpose-setting exercise several times. Realize that even in the Internet Age missions coalesce over time and morph as needed in response to changes in the environment. What you are really doing here is initiating an ongoing mission-setting process.

In the end, your team must make its purpose explicit and concrete. For some, this means writing down the purpose in a formal mission statement; for some it is a list of outcomes; still others will embrace a diagram or picture that captures the essence of what the team is about. These, too, are icons of an emerging identity. (See Figure 10.2.)

Figure 10.2 Mission



Ready to begin? Answer this question: “Why are we doing this?” Draft a statement of intent. Make your proposed mission—your topmost goal and essential motivation to action—explicit. Use verbs, action words. As time goes on, the revised and updated purpose statement becomes the formal instrument for stamping and evaluating the group’s legitimacy.

Now answer: “What are we going to do?” Can you name the team’s primary result? Use nouns to describe the real objectives, the bottom-line outcomes that are the team’s reason for being. Mentally place yourself in time at the end of the project, then look back. Draw pictures that describe the final product of your team’s work.

Decisions and deliverables—such as events, reports, presentations, prototypes, or anything else that represents the concrete consequences of joint effort—are all results. Some, like GE Six Sigma teams, express the ultimate products of their work in numbers. Market share, lower cost, and faster cycle times all are great metrics. Where criteria for success are clear, state them.

Every mission statement and its proposed result sit inside a broader vision, whether explicit or implicit. It’s the vision that stirs the passion of purpose—or the ho-hum lack of it. Historically, the leader expresses and nurtures the vision with spoken words. Written down, the vision serves as the preamble to missions and goals. E-mails, memos, diagrams, presentations, white papers, and other symbols of shared motivation accumulate and help spark the emotional bonds that carry the chemistry of collaboration.

Step 3: Determine Milestones

For many teams, virtual or not, the period from the first quickening of vision to the stating of a clear purpose may take as long as the whole rest

of the life of the team. Start-up can be frustratingly long or bewilderingly brief. Setting milestones signifies a quickening of the pace and advance preparation for implementation.

Teams live according to the calendar; they immerse themselves in time. They sputter into life as people talk, meet, argue, agree, and formalize. Early team history accumulates as people make contact and strengthen relationships, whereas it records later history in events, activities, and outcomes.

To establish its overall schedule, the team sets or accepts delivery dates for results, however imprecise the estimates may be. Key outside dates, such as budget cycles and major conferences that impact the team, help shape the calendar. One-time deadlines, milestones, or periods for performance evaluations all punctuate team life and help you rough out the phases and pace of activity.

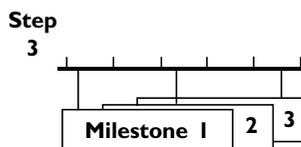
New teams usually have a time frame in mind—whether fixed, firm, or flexible. This is the time container within which the team’s life plays out. Use the “Stressed S” curve (Figure 6.2) as a guideline for marking expected milestones that segment the life cycle into big chunks. Time frames for start-ups are particularly opportunistic and situational; thus milestones are more difficult to discern and predict. (See Figure 10.3.)

Whether one date in the future or a time line of major milestones, this exercise creates a time frame for making estimates and setting goals. Of course, flexibility is the watchword for realistic schedules.

Step 4: Set Goals

The next step is to carve out the major pieces of work for the team, the internal structure that distributes leadership. To get from vague vision to concrete results, you need to organize the work and decide who’s going to do what.

Figure 10.3 Milestones



Do not leave your internal organization to chance.

Even the smallest groups form into subteams to get work done. Be conscious of your choices. Internal design is your key to collective intelligence.

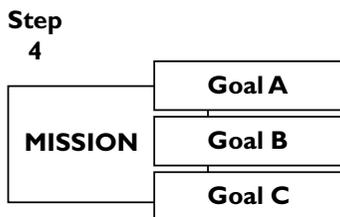
Establish a set of goals that, when achieved, together accomplish the overall purpose. Well-conceived goals mark the major ingredients of the team's work and are the seeds around which subteams take shape to actually do the work. They are like the internal functions of a corporation—work units that productively organize clusters of people. For us as individuals, subteams mean we wear many hats in many small teams.

Make a first cut at naming the key goals of the team. (See Figure 10.4.) Keep these major categories to a handful or two (five to ten). Assess whether this set of goals covers the mission and the achievement of the overall result. Brainstorm this list as soon as you can and come back to it when you can. Keep the categories fluid as purpose, people, and links are initially itemized. Look ahead to nailing down the goal and subteam categories as the team positions for takeoff.

The right goals provide the magic of motivating energy.

After the first pass at goals, discuss a single concrete result for each goal. State multiple results as needed. Sometimes the result already resides in the goal statement, and you can simply pull it out and make it explicit so that you can track it. Other times, a perceived goal falls apart because the

Figure 10.4 Goals



group cannot see, or cannot agree upon, a concrete outcome or measure that represents it. Indeed, the discussion of results often uncovers real disagreements and viewpoints.

Collaboration depends on cooperation. Getting collaborative goals right is an art, not a science. Collaborative goals require interdependence, but dependencies are a feature of competition as well. Competitive conflicts develop from differences in people's personalities, motivations, fears, perceptions of the facts, opinions, interests, and how much power they wield.

The path to cooperative payoff often leads through the thickets of competitive conflict. Indeed, this is where truly excellent teams shine—in moments when they meet their greatest internal challenges. Virtual teams are particularly challenged and don't work well when internal competition is high. Trust breaks down, and face-to-face meetings or intervention by trained team professionals are sometimes the only ways to resolve the conflict.

Step 5: Identify Members

People or purpose, which comes first? Answer: Both. A team emerges from the goal-oriented activities of people. As a team crafts some detail around purpose, it concurrently identifies whom it needs to involve.

Make a first list of people and organizations in "bands" of membership from the team's point of view. At the top, write the names of the small core group, followed by the extended team of closely involved members. After that, record the external network of experts and support people whom you recruit on an as-needed basis (Figure 8.2).

Roles are important from the earliest moments of team formation. In many cases, roles become clear in response to the mission before people are identified to fill them in. Later, filling in roles next to people's names on the team roster helps clarify responsibilities. Role clarity must match role flexibility.

To track membership as explicitly as possible, generate a team table. Columns of name, role, organization, and workplace intersect with rows stacked in the order of core, extended, and external participants (Figure 10.5). By noting the home group of everyone involved and the location of their primary workplace, the team better understands who's involved and how virtual the group is.

Figure 10.5 Team Table

Step 5		Name	Role	Group	Place
Core					
Extended					
External					

The team table is a practical shared group model of the team's membership. Combined with filled-in profiles of individuals and organizations, the table turns into one of the most useful tools a team can create for itself—a group directory.

Early team lists are quite dynamic. The people who come up with the original idea may not be on the team, key people may require recruiting, and the team may identify empty roles for needed expertise, experience, or representation. Lists of members may start on the backs of envelopes, but they eventually become relatively formal.

A list of names offers an additional bit of basic information about the team: its size, even if membership boundaries are less than exact, particularly in the beginning. Thus, size is sometimes expressed as a range (for example, seven to nine people). Membership is often a moving target for virtual teams, becoming increasingly ambiguous at the fringes as the team grows.

To reach people in the virtual world, you need to know their addresses. Contact information is central to the team, cataloging its boundaries and the means of crossing them. Set up a template for personal profiles to collect the many addresses people have. Include everything you can think of: office locations, snail mail (traditional postal) addresses, phone numbers (office, home, car, cell, voice mail), fax numbers, e-mail accounts (perhaps several), and URLs. Make it easy for people to upload pictures and link to more information about themselves. In selecting categories for online profiles, consider the things you would naturally communicate in face-to-face settings.

Review and update your own contact information. Expand the list to

include the new members as they appear. A virtual team has external contacts as well as internal interactions, so directories should include all the people in its larger network.

Step 6: Establish Relationships

To say that virtual team success is 90 percent people is not to say that those people are in isolation. The relationships among people are key: Who needs to connect with whom for what purpose?

For new teams with new objectives, relationships must emerge. Virtual teams can anticipate this by mapping the relationships needed to accomplish the purpose.

One hidden danger lurks on the sidelines of virtual teams: the idea that everyone needs to be involved in everything. You can avoid this recipe for disaster by clarifying just which goals and decisions need everyone’s input and which do not. The rich conversation about who needs to be involved in which goals helps people sort through and reduce anxiety about what is attainable. The exercise inevitably flushes out additional needs for expertise and representation, leading to new recruitment and perhaps a larger team. At the same time, people often reevaluate, cluster, or break out goals further during this review.

Goals intersect with a team’s membership in a simple relationship matrix.

Identify who needs to be involved in what through a dialogue that you can detail in a Relationship Matrix (Figure 10.6). This dialogue—whether

Figure 10.6 Relationship Matrix

Step
6

	Name	Name	Name	Role	Name	Group	Role	Name	Group	Group
Goal A	X	⊗	X			X			X	X
Goal B	⊗		⊗	X		X	X	X		
Goal C	X	⊗		X	X			⊗		X

in person, on a conference call, or online—addresses each high-level goal and the subteam needed to achieve it. Whenever someone volunteers, is cajoled, or appointed (especially absent members) to a goal team, indicate involvement with an *X* in that member's column.

Each goal requires at minimum one person, and some goals call for everyone's involvement. For most collaborative goals, you need a subset of the whole team. Use the construction of this matrix as a way to explicitly distribute the work, obtain the right participation, identify leadership, and track commitments. (See Figure 11.1 for a more detailed view of this process-mapping technique.)

For each goal team, designate one or more members as leaders. These are the people responsible for specific results. Goals lead to results, so every result will have at least one person responsible for it. Leadership may be singular or multiple, determined in the course of the goal-by-goal dialogue.

Virtual teams increase their overall leadership capability as they divide the work. By identifying task-based leadership, a group distributes its management burden. A team may go into a relationship-mapping session with one appointed leader and come out with everyone feeling like a leader. Shared leadership creates trust in the team. The higher the level of trust, the less people will feel the need to be involved in everything.

Task leadership alone is not sufficient for virtual team success. The team needs people to provide process roles such as liaison, facilitator, knowledge developer, agenda designer, and communications support. It is relatively easy to make task leadership explicit. Not so with process leadership. Aside from overall team leadership, the social roles required to develop and maintain team processes are hard enough to recognize and acknowledge in colocated situations. Acknowledging and filling new roles expands a group's consciousness of itself as an entity.

Step 7: Choose Media

The relationship matrix and team roster indicate who needs to develop connections with whom to complete different aspects of the work. Many virtual teams need or may greatly benefit from face-to-face time, particu-

larly at the beginning, to develop the plan and build trust. Physical separation is the most common plight of virtual teams, so it is important to evaluate the impact of distance in thinking about the team's communication.

Consider your options at this time of incomparable media choice. Review technologies in the media palette (Figure 9.1). Choose from all eras of communications to best fit the work process needs.

To simplify choice, we think about media in three basic ways: face-to-face, virtual same-time (synchronous), and virtual asynchronous. Face-to-face is in our genes and stands by itself as the reference point for direct team communication. Synchronous virtual meetings and other activities may be as simple as phone calls, as expensive as two-way video, and as productive as audio-enabled web meetings in virtual team rooms. Asynchronous connections can be made by mail, print, fax, and voice mail. It is, however, the digital media of e-mail, threaded discussions, interactive web sites, and knowledge management databases that provide a truly powerful anytime-anyplace foundation for successful virtual work.

Since the choice of team media is so often influenced by what people already use, it helps to have a way to choose media according to the nature of the work. Look at the goals in terms of the work they imply: generate, choose, negotiate, or execute.

- *Generate* is about creating plans and developing new ideas.
- *Choose* focuses on solving problems with correct answers and making decisions where there are no right answers.
- *Negotiate* is about resolving conflicts of clashing viewpoints and the more difficult mixed-motive conflicts of interest.
- *Execute* is about directly doing work.²

Now that you have a general feeling for the type of work required to accomplish the mission, consider how effective and efficient different media are. For generating ideas and executing activities, virtual media, both synchronous and asynchronous, can be as effective as face-to-face, and it is usually more efficient. Choosing and negotiating are often best done synchronously, and negotiating especially requires face-to-face sessions to be most effective.

The team's media plan grows out of the relationship matrix, conveying the means by which the team communicates the miracle of productive interactions (Figure 10.7).

A media plan may not amount to much if it simply mandates a face-to-face Monday morning meeting—a typical colocated team approach to staying connected. Virtual teams inevitably require multiple media in order to use the right specific medium at the right time.

Look for the most appropriate media to meet your unique needs, with obvious consideration of cost and availability. You may want a videoconferencing system but find it currently too expensive or impractical (e.g., there is virtually no synchronous time frame for a virtual team spread from California to Europe to Asia). Within your constraints, experiment to find what works best. Then stretch your sights, particularly to find ways to use more. Digital media provide the natural environment for virtual teams and will eventually become ubiquitous.

But new media is still new to most people. In determining the communication plan, have people indicate their relative preferences for different media or their willingness to gain access to and competency in a medium they do not currently use. Do not lose sight of the fact that people do not connect with media: They connect with other people.

It's important to agree to protocols for the use of your team's media. Agreements around protocols may flow proactively from best practices (which many of the stories in this book reflect), or they may be put in place retroactively when a team's pattern of communication is not working. An important part of the team's social skill is its stated communications norms and covenants.

Figure 10.7 Media Plan

Step 7	Type	Media	Protocol
Goal A			
Goal B			
Goal C			

Play It Again, Sam

The seven steps of a turbo launch may be all you need. You ought not burden a relatively short and simple project of a few people. If you can settle the basics in a few meetings, face-to-face and/or virtual, and can summarize them in a couple of pages, you need go no further in designing your virtual team.

Or you may need to cycle through these essential elements several times, especially as new people join the team. This ensures that everyone thoroughly understands the shared mental models and that people work together to establish some basic trust.

Always invest in beginnings.
