

# **Managing Virtual Projects**

**Today, Most Project Teams Cannot Be Co-Located**

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Current Project Management training programs, books, and magazine articles assume that project teams are co-located. The guidance that those sources give to project managers may be excellent for project teams where everyone is within speaking distance of each other, or at least can see the color of each others' eyes once a week or more often. But the advice often falls short when applied to project teams when the members are located in different parts of the world. Typical teambuilding exercises that work well with co-located teams are to get everyone together to discuss an issue, sharing personal stories over pizza, or bringing the participants and their families to a project picnic. These activities enhance the feeling of camaraderie and ease the task of getting everyone to collaborate. But when your team members are located in Europe, Asia, Africa, and South America, it is nearly impossible to get everybody together at the home office in Indianapolis.

## **What Can Go Wrong With Virtual Projects?**

Tools that are highly effective in aiding communication among team members and with customers and sponsors of traditional projects often don't apply to virtual teams. Consider teambuilding exercises. In my work as a consultant to companies, I often am asked to help the project team develop more cooperation and streamline their interactions. This isn't difficult to do when the team members are easy to get into one room at the same time. I can give them powerful exercises that are effective in helping participants to observe themselves during communications and to understand the need to listen more and use less emotional language during interchanges with other team members. Inevitably, these exercises result in smoother teamwork and increased trust throughout the team. But if you can't get these folks in the same room, how do you get the team members to trust each other, exercise more effective communications, and work more collaboratively?

Communication is difficult even when the communicators are sitting next to each other. But it is much more likely to be poor when the communication isn't face-to-face. When you aren't looking at the person to whom you are speaking, you can't see the "non verbal" parts of communication—body language, physical reactions, and gestures.





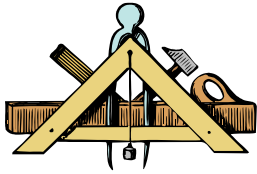
Experience has shown time and again that a good way to improve communications is to get everybody together in a face-to-face discussion. When we fail to do this, some project participants miss some of the information that they need to do their jobs and the project performance suffers. The entire project team, the sponsors, and ultimately the customers suffer when the communication isn't optimized.

Parochialisms is a common human instinct. It is always present in all interpersonal relations, and is a factor in all organizational dialog. We know that everybody "looks out" for him or herself and for his or her own organization. It is difficult to believe that fellow project participants will do things that are in the interest of the project when they conflict with the personal interests of the individuals. Effective teamwork depends upon everybody trusting everybody else. Project team members must believe the others are striving to achieve the common goal. It is easier to believe this if we can see what others are doing. Of course, in virtual teams, our team members are out of sight and we have a lot more trouble developing trust in them.

Because of these difficulties in developing trust and improving communications, virtual projects tend to overrun budgets and miss scheduled milestones more often than traditional projects do. In a survey of 81 projects in 12 companies that I conducted a few years ago, 7% of the projects missed their schedule and/or budget targets when all the participants were co-located, 39% missed their schedule and/or budget goals when about 50% of the team was co-located, and 93% missed them when the team was less than 10% co-located. This makes a strong case for co-locating the project teams, but that just isn't possible in most modern situations.



Other important issues in virtual teams are the result of cultural differences. These compound the probability of misunderstanding each other. To deal effectively with cultural differences, it is important for the communicators to learn about each other *as individuals*. This is not an easy task when the participants are in frequent proximity of each other, but misunderstanding is exacerbated when the participants seldom meet each other.



TOOLS	
V—	Vision
I—	Interactive
R—	Reviews
T—	Trust
U—	Uniform
A—	Access
L—	Leverage



## What Should We Do?

Solutions to the problems of virtual project teams can be understood by considering the word “VIRTUAL.”

- V—shared Vision
- I—use Interactive technology
- R—frequent and effective Reviews
- T—build Trust among participants
- U—use Uniform tools, forms, and language
- A—Access common database
- L—leverage face time

### Details:

V—shared Vision.

Start by establishing a shared vision for the project. ”Shared” means that the vision must be jointly developed, not handed down from the sponsor or project manager to the team. Only if the team feels they have participated in developing it will they take ownership in it and devote their full energies to making it happen. If it is at all possible, the team should be assembled for the Kick-off meeting and the vision jointly established at that time.

Frequently revisiting the mission of the project is essential too, since the team needs to stay focused and can only do so if their awareness of it is current. The frequent discussions may need to be held via telephone or e-mails, but they should be conducted nevertheless. It is better to state the mission of the project too often than to not state it enough. I contend that project managers are not doing their jobs well unless the team is a little bored with the constant re-stating of the purpose and goals of the project. Until you hear someone say, “Stop, I’ve heard that already!” you don’t know if you’ve stated it often enough.

I—use Interactive technology.

You probably already use e-mail and telephone services effectively to communicate with your project team. If you could improve the manner in which you use them, some training may be in order for you and/or your project team. We should not assume that everybody



already knows how to use these tools just because they have been around for a long time. The efficient and effective use of these tools is essential to a successful virtual project.

There are powerful tools available today to assist in conferencing and sharing information. Virtual project teams need to be abreast of the latest and most effective tools available. On the Web, ConferZone.com is a site that offers centralized, unbiased information on e-conferencing technology, including hardware, software, training and consulting services. Subscribe to their free e-mail newsletter and check the site often to see what's developing in this important field.

Your virtual project team needs to be trained in the use of teleconferencing tools if you use them. When participants are conducting business via videoconference, it is important that they stay "on camera" when they need to be seen by everyone in the conference. Participants need to know who is speaking in a voice conference, so each speaker needs to remember to identify him or herself before delivering a message. These suggestions may seem obvious to you, but nearly all teleconference participants forget them under the pressure of an important virtual meeting.

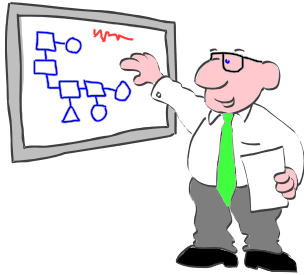


Many data sharing tools are extremely helpful to virtual project teams. Lotus notes permits fairly user-friendly interchange of information, recording, and sharing of data in common location. PlaceWare is a provider of real-time online meeting services to facilitate Web-based meetings and seminars. iPresentation Suite is a new product from Presenter Inc. that lets you store audio and video PowerPoint presentations and download them to a participant's desktop computer, lap-top, or PDA. EmailPresenter transforms PowerPoint presentations onto Macromedia Flash e-mails for distribution anywhere on the Web; these can then be used for a virtual kick-off meeting or progress status review. Virtual Conference is a newly launched Yahoo! Broadcast Service offering that provides an alternative to large-scale meetings. The service combines audio, video, and slides synced to presentations, with numerous subject tracks available for live or on-demand viewing. Interactive tools, such as polling, question-and-answer, and document sharing are included.

All of these tools require some training and the investment cost may preclude their use for you project, but you should investigate them.

e-learnmag.org is a free Web publication that reviews the news, information and opinion on the field of Web training, conferences, and other technology alternatives to business travel.

## R—frequent and effective Reviews



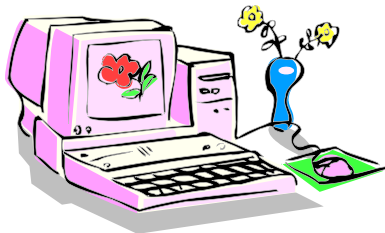
Frequent reviews are essential factors in the effective management of any project. But when the project team is spread all over the map, the need for frequent reviews escalates. It is essential that everybody know what is going on, what is necessary, and who is doing what. There is simply no other way to convey the current status of a project so that everyone knows his or her part in the project than to participate in frequent reviews.



How often should reviews be held? A little more often than necessary. You don't want to have so many meetings that your staff complains they have no time to perform because they "are always in meetings," but that is no excuse for not giving everyone a little more information than they think they need.

## T—build Trust among participants

We only trust people that we know. If our associates are trustworthy, the better we know them, the more trust we will have for them.



Most companies restrict the use of the organization's e-mail and telephone to "business" purposes. You can't use the corporate e-mail for sharing personal information, telling jokes, and asking personal questions. This aggravates the problems inherent in virtual teams. People must get to know each other personally or they will never trust each other. In order to build a better virtual team you are going to have to develop some means of getting folks to chat with each other. If you can't use the organization's Intranet and PBX systems, or chit-chat, you will have to find other ways to get people to share their personal stories with each other.



## U—use Uniform tools, forms, and language

Use common tools such as Gantt chart schedules, Line-Graph Budgets, standardized meeting agendas, and common status/progress report formats.

A common format for a progress review is:

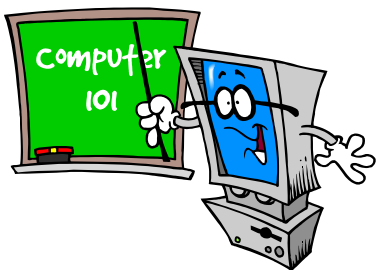
- √ The Project Purpose—Where are we going?
- √ The Project Plan—Where should we be in terms of time, budget, and work accomplished?
- √ The Actuals—Where are we currently on our schedule, budget, and work performed?
- √ Variance Assessment—Why is there a difference between where we are and where we want to be, and how serious is the discrepancy?
- √ Next Step—What are we going to do before the next review?

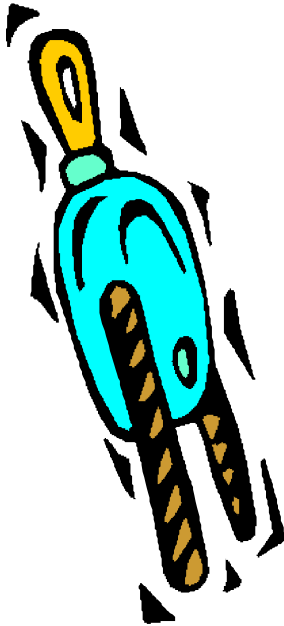
## A—Access common database

A project notebook is a profoundly simple but effective tool for keeping everything about the project in one place. Today, technology supports the deployment of a project notebook that everyone can access. You can have the notebook stored in a central location (an Intranet Web Site) and everyone interested in it can open it up and review it whenever they want to do so. It can serve as central database for your project throughout its life.

The notebook should contain all information about the project—its purpose, the plan, and its current status. You will need to establish protocols for changing the notebook and for updating the information it contains. The notebook must not become obsolete or it will quickly become a burden to maintain and will contribute little to the project's execution.

You will need to train your virtual team to access and use the information contained in the notebook periodically. It is not adequate to assume that if you create the notebook and keep it current, the project participants will access it and know what is in it at all times. You will need to hold “virtual review meetings” at which you discuss with all the participants the current status of the project so they will access the notebook and stay abreast of its contents.





## L—Leverage face time

Since you cannot meet with everybody face-to-face, it is essential that when you do meet, the face-time be optimized. People need to get to know each other quickly, develop trust for one another, and share what they are each doing on the project in a short time.

First of all, it is essential that your virtual team members get together when they can. Whenever it is possible to do so, you need to encourage whatever travel and expenses you can muster to get your people together. Holding a kick-off meeting at which all of the players are invited is sound advice. Baring that, bring as many of the players together as you can whenever you can.

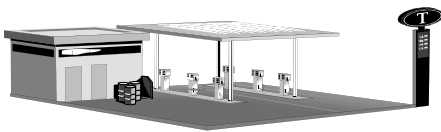
When virtual team members do meet with each other, you will need to leverage the time they do spend together by being as efficient at possible. Learning how to conduct effective meetings is essential, because you cannot afford to waste the precious time that your people are together. Train everyone in conducting and participating in effective team meetings.

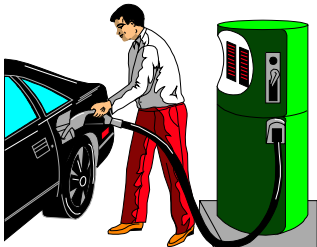
The use of common tools, reports, and formats is obviously valuable. When we know a standardized format is being followed for the agenda of a meeting, we will be able to participate more effectively.

It is recommended that trained facilitators be employed whenever possible. These may be representatives from the HR department in large organizations, or external consultants with enough knowledge of corporate culture to effectively guide the meetings and interactions. But the best place to position facilitators to streamline interactions between virtual project team members is in the project management office (PMO).

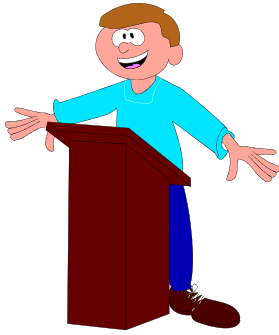
### Example—Gas Stations and Convenience Stores

A large petroleum-processing firm builds gas stations and convenience stores for its franchises in many states. The on-site field engineers have to interface with team members located literally all over the United States to get permits, architectural drawings, landscaping designs, connections to the sewer system and water veins, electrical power,





building construction, and dozens of other activities accomplished on a tight project schedule. The franchiser often wants to have all sorts of changes made, some of them can be included in the project but most can't so the project manager must help the franchiser understand what is possible and what isn't. This firm brings its virtual team members together once every six months if at all possible (someone is nearly always missing but great effort is made to have full attendance) for face-to-face discussions. Kick-off meetings are held for several projects at one time, and the team is "trained" in the use of those tools that will be used to aid communications. Occasionally the kick-off meeting is held via teleconference. In any case, a portion of the kick-off meeting is devoted to team building activities and some to jointly developing the project's purpose and plan (Shared Vision). The team uses Lotus Notes and Teleconferencing tools. Everyone is trained in the use of the tools that are used (Use Interactive Tools). The project manager is required to report the status of his or her project bi-weekly, but most of them hold weekly status/progress review, employing a standard format for their own projects (Frequent and Effective Reviews). The firm pays a lot of attention to the need to nurture collaboration among team members. The Kick-off meeting includes a facilitated activity aimed at "getting to know" each other. While the use of the Internet for personal business is discouraged, the project managers often send notices about personal achievements of members of the team to encourage teambuilding (Build Trust Among Participants). The projects are all required to use Gantt Charts for schedules, Line Graph Budget charts to convey cost performance, PERT charts to display the Critical Path, and a standard reporting format (Use Uniform Tools, Forms, and Language). Each project is required to maintain a database with the project's statement of work, plan, budgets, and actuals. This requires a little effort to keep this project notebook current, but it pays huge dividends in improved awareness by everybody of what is going on at all times (Access Common Database). Finally, the company employs facilitators to steam-line meetings when they are held. Several facilitators are corporate Human Factor Department Internal Consultants, but some are External Consultants with special virtual project management skills and knowledge. The company makes a serious attempt to get people together for face-to-face meetings whenever it can (Leverage Face Time).



## What Should You Do To Apply Virtual Team Practices?

- Maintain priorities
- Keep the team aligned with the project's purpose
- Motivate the team
- Resolve stress and avoid conflicts
- Praise and reward team performance
- Counsel and discipline individual behavior
- Understand and deal with cultural differences

### Application

Management will resist virtual teams because they want immediate results and they want to avoid personal issues. Old cultures are based on rewarding individual performance and (accordingly) inherently reject collaborative behaviors.

It is human nature to trust those closest to us. The virtual team members who are located nearest the project office will get the best assignments and will be trusted the most to do the difficult jobs. People performing project tasks in distant locations will feel left out and abandoned. As the project managers, you will need to work diligently to overcome this natural tendency to trust those closest more than you trust those located at a distance. Make a special effort to communicate with those located at a distance.

It is always profitable to get help—use a facilitator and consultants who have actually managed virtual project successfully. There are too many consultants who will be willing to help you but have no experience managing the kind of projects you manage. Avoid them.