BUILDING AND DEVELOPING SUCCESSFUL VIRTUAL TEAMS

Jimmy Ortiz, PhD
Advisory Council Member, Grupo 21
Albuquerque, New Mexico
August 3, 2023
ANY TIME YOU HAVE AN OPPORTUNITY TO MAKE A DIFFERENCE IN THIS WORLD AND YOU DON'T, THEN YOU ARE WASTING YOUR TIME ON EARTH

-ROBERTO CLEMENTE
Which of the following top 3 attributes do you as a leader consider to be the most important in managing a successful virtual team?

1. Help overcome a feeling of isolation amongst the team
2. Know the individual strengths and challenges of each team member
3. Provide skill building and coaching opportunities
4. Communicate and drive a vision
5. Foster team cohesion
6. Build trust
7. Get comfortable with virtual communication tools
8. Create an environment of collaboration and sharing
Which of the following top 3 challenges do you as a leader consider when leading a virtual team?

1. Help overcome a feeling of isolation amongst the team
2. Know the individual strengths and challenges of each team member
3. Provide skill building and coaching opportunities
4. Communicate and drive a vision
5. Foster team cohesion
6. Build trust
7. Get comfortable with virtual communication tools
8. Create an environment of collaboration and sharing
VIRTUAL WORK LIFE
LEADERSHIP AT IT’S BEST!

“Leaders are responsible for creating an environment in which people feel they can be their best”

- Simon Sinek
CHALLENGES OF WORKING REMOTELY

- Internet connectivity
- Too many distractions at home
- Caregiver role
- Physical workspace
- Digital miscommunication with colleagues/clients
- Social isolation / general stress
- Limited access to tools and resources
- Finding a healthy work-life balance
- Time management problems
NORMAL OPERATIONS

- Continuity of Operations Plan (COOP)
  - Essential Functions and Key Personnel
  - Vital records, Systems and Equipment
  - Virtual Secure Communications
  - Alternative Worksites and Flexible Work Schedules
“THE NEW NORMAL”

- **Pivot**
  - Re-strategize

- **Agile and adjust**
  - Advanced Flexible Work Schedules
  - Hoteling
  - Less Travel
  - Working Offsite

- **Remote Working Team Challenges**
  - Providing support to effectively manage programs, projects and teams virtually
  - Using productivity tools: project management, communications, scheduling, etc.
  - Supporting team members in reaching targeted goals
  - Maintaining your organizations culture
  - Creating and maintaining your organizational network
LEADING TEAMS THROUGH CHANGE

- What issues do leaders face during periods of change?

- What can a leader do to overcome team challenges?
BUILDING RESILIENCY THROUGH CHANGE

- **Resilience:** the ability to be flexible, adaptive and forward thinking

- **Helping employees through uncertain times**
  - Creating an emotional safety workplace and promoting a resilient workforce
  - Trust helps you build confidence, stay open-minded, and remove obstacles
  - Reaching out to individual team members (wellness check)
  - Building stronger bonds by sharing your personal experiences and challenges

- **Indicators of Employees distress:**
  - Distraction: continuously thinking about the pandemic and potential health risks
  - Anxiety and stress caused by integrating work and home-life demands
  - Fear: personal distress impacting the new normal
SOLUTIONS TO BUILDING RESILIENCY

- Share ideas on how to address family needs, acknowledging employee fears and stress
- Allowing for work flexibility beyond remote working by accommodating work schedules and project deadlines
- Eliminating in person participation
- Empowering employees by clearly communicating work priorities and aligning resources
- Provide transparency on business conditions and performance
- Finally, when in doubt reach out to your Human Resources team
MANAGING COMMUNICATIONS

- How is managing communications in virtual team different from managing a team at the office?
- What can a leader do to improve virtual team communications?

“If you do not intentionally, deliberately and proactively include, you will unintentionally exclude.”

– Joe Gerstandt
EMPLOYEE ENGAGEMENT

- Develop Virtual Team Action Plan
  - Remove obstacles that interfere with the team’s work through empowerment
  - Define clear work goals and objectives
  - Encourage teamwork and collaboration

- Recognize
  - Acknowledge the efforts of individuals and team efforts
  - Send a “thank you note” email/text
  - Cash or Time-off Award

- Celebrate milestone
  - Take time to acknowledge individual and team achievements
MANAGING VIRTUAL FATIGUE

- Establish “Office Hours”
- Manage your schedule
- Keep meetings brief
- Get up and take a break and lunch
- Avoid back-to-back virtual conferences
- Pick up the phone or dial virtually
STRATEGIES TO LEAD VIRTUAL TEAMS

- Focus on continuous improvement
- Set up a conducive home office
  - Establish and communicate work hours
  - Schedule lunch, personal time and “non-meeting days”
- Connect with your employees – Remember, we are still human
- Adjust management style for team members as needed
TELECOMMUTING TIPS

- **Help Yourself Maintain Focus**
  - Designate a work area. When it is time check out, shutdown computer
  - Schedule more complex tasks/meetings when you are most alert

- **Remain Visible**
  - Maintain team members updated on your current tasks and progress
  - Inform stakeholders on the status of accomplishments and timelines

- **Take Care of Your Well-Being**
  - Establish clear boundaries between work and personal life
  - Remember to take breaks
  - Avoid being “over productive”
  - Create a comfortable workspace
  - Dress for virtual work to trigger your brain to differentiate between work and home life

- Continue to further develop your skills
“Technology now allows people to connect anytime, anywhere, to anyone in the world, from almost any device. This is dramatically changing the way people work, facilitating 24/7 collaboration with colleagues who are dispersed across time zones, countries, and continents.”

— Michael Dell, Chairman and CEO of Dell
Jimmy Ortiz, PhD
jimmyortizphd@gmail.com