HeiterConnect, Inc.
CONCEPT Workshop

Living In a Virtual World

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Workshop Objectives

- Investigate our assumptions about the electronic habits of others

- Learn 5 tips for leading virtual teams

- Discuss techniques for running virtual meetings that accomplish the business at hand while developing relationships

- Share experiences, challenges, tips

Workshop Roadmap

Today

- **Welcome and Overview**
- Electronic Body Language™
- Leading Virtual Teams On and Off Shore
- Facilitating Virtual Meetings
- Personal Reflections
- Plus/Delta

Guidelines for Workshop

1. Be on-time and ready to start

2. Cell Phone/Pagers silent

3. Generous listening

4. All opinions are valued

5. Be thoughtful and succinct in your comments

6. Actively participate

7. Respect confidentiality

8. Others?

Introduction Questions

- Your Name
- One of the following:
  1. Your role
  2. Your company
  3. Expectations of the workshop
  4. Number of remote employees
  5. Experience with virtual work
  6. Biggest current "virtual" challenge

Re-Introduction Questions

Take <u>one</u> minute to tell us:

- Your company

- Your role

- Your experience in the virtual space

- 1-2 expectations

- What would make this workshop a total waste of time for you?

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Electronic Body Language™

What is electronic body language?

Scenario 1

- You sent a clear, concise email over 24 hours ago and haven't received a response.

Scenario 2

- You received an email with many grammatical and spelling errors.

Scenario 3

- There are 9 people on the call. No one is self-identifying. No facilitation.

Scenario 4

• You receive an email with a date and time of Saturday 9pm.

Scenario 5

- You left a voicemail, received a response by email.

Scenario 6

- You are on a conference call with 9 people. The group is trying to reach a decision. There are many pauses and much silence.

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Activity Instructions

- Take a paper from the center of table

- Move to face the wall

- Listen carefully and follow facilitator instructions

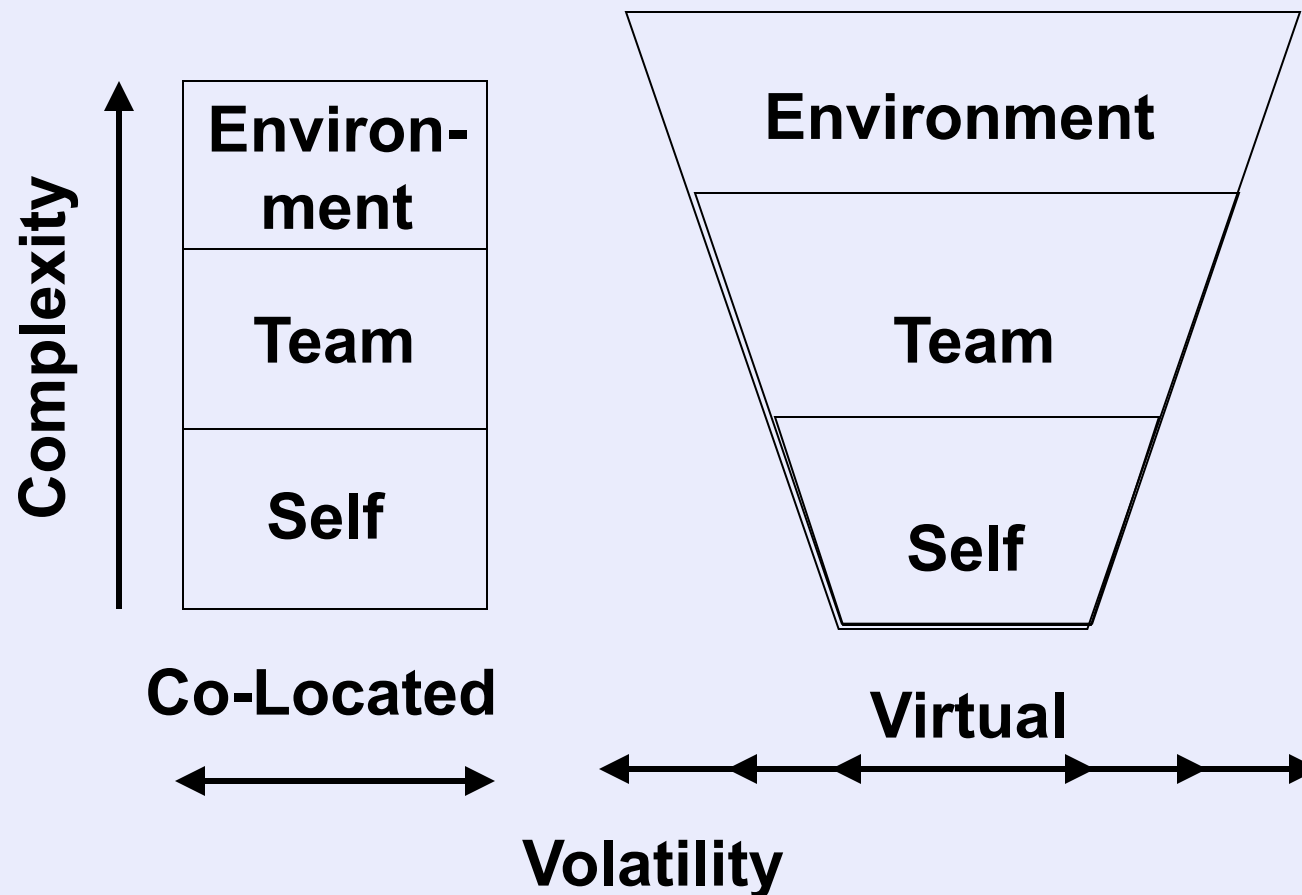- Concentrate on your own work

- No talking

How does this exercise relate to leading virtual project teams?

Virtual Leadership Comparison Model

Tips for the leading virtual project teams

Tip # 1: Be Explicit

Make the implicit explicit in areas such as:

- Contract areas

- Decision-making – levels of autonomy

- Communication plan and protocols

- Availability – hours, holidays, for what reasons

- Sharing of Ideas

- Processes and procedures to follow
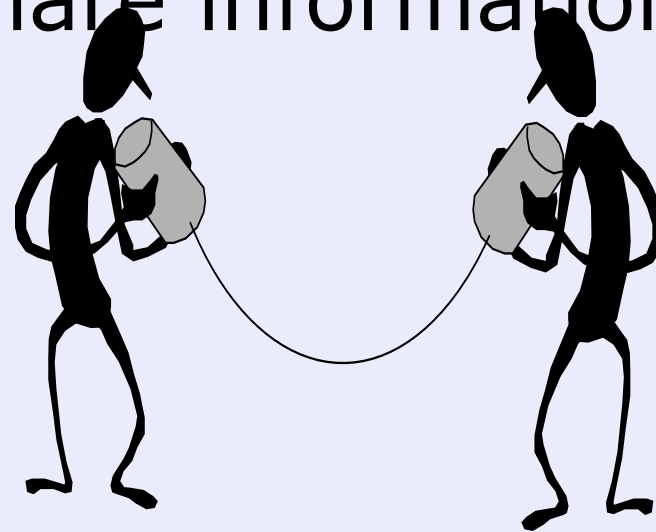
- Requirements gathering

What is a Communication Plan?

A plan for how a group or team will share information

Includes:

– Who

– What

– Where

– When
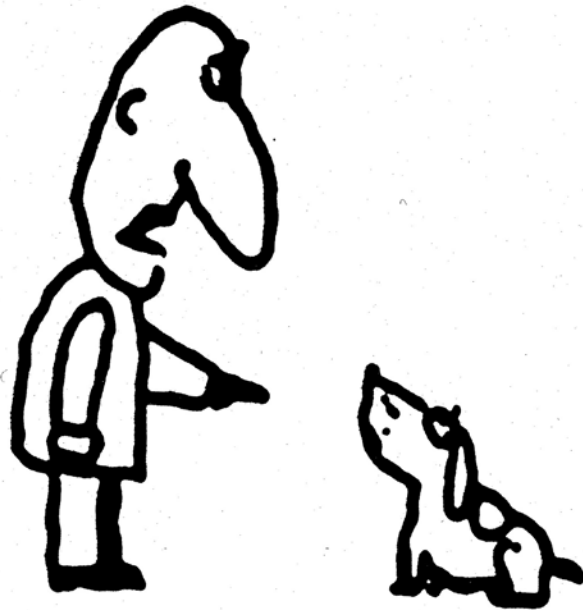
– How

Areas for Communication Plan

- When to use and not use which medium
- How to use each medium - conventions
  and protocols
- What information is needed by when
- Goals tracking and status updates
- Version control
- External stakeholder communications

Be Specific

Tip #2: Create Presence

Using "presence" to create better relationships and connections with key folks at the offshore site(s)

- What do we mean by presence?

- Why is presence so important in the virtual arena?

Importance of Presence

Presence fosters connections

- helps create trust
- overcomes isolation from leader and others
- elevates team priorities
- keeps leader informed about contract sites
- motivates through connection
- feedback
- models what you want from contractors

How does presence impact virtual or semi-virtual relationships?

Behaviors That Create Presence

- being in touch regularly – reaching out

- getting needed resources

- encouraging involvement

- being available

- knowing about activities at sites

- knowing about people at sites

- pushing information to sites

- getting input in decisions

Tip #3: Influence Through Reciprocity

Using influence and reciprocity
to achieve goals

The Law of Reciprocity

Anyone who does something for someone else expects to receive value from the exchange —whether

tangible or intangible.

Reciprocity =

Exchange

Mutual Gain

Partnership

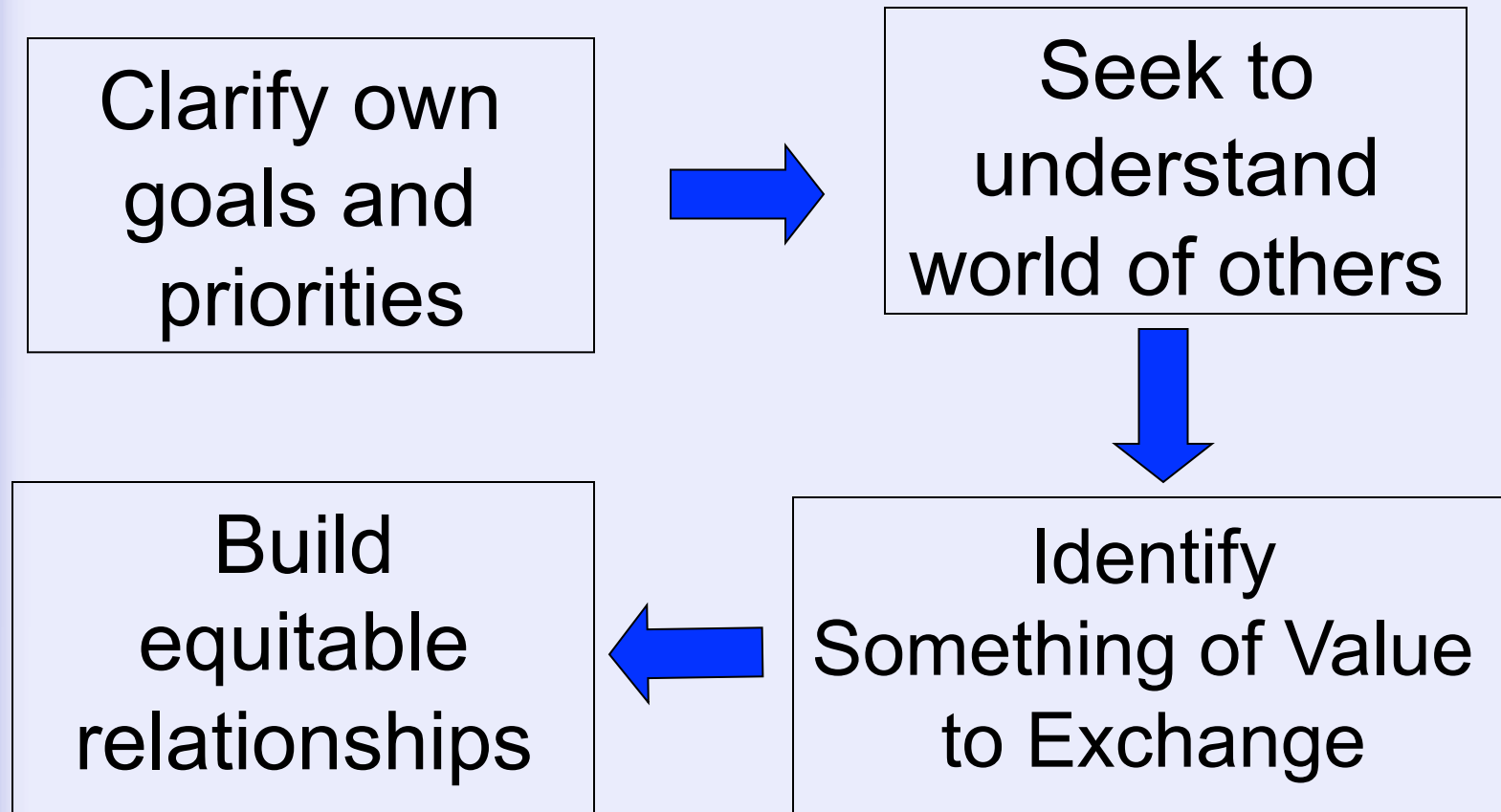**Give & Take**

Barter

Trade

How Influence Works

The individual who wishes to exercise influence wins the support and cooperation of others, by offering to help them satisfy their goals.

Effective Influencing Model

Clarify own goals and priorities →

Seek to understand world of others ↓

Identify Something of Value to Exchange →

Build equitable relationships

Tip #4: Be Culturally Curious

Being aware of style, language, cultural differences

- **Develop and adjust communications**
- **Adjust for English (or other) as primary language**
- **Understand the differing cultural values of the country, region**
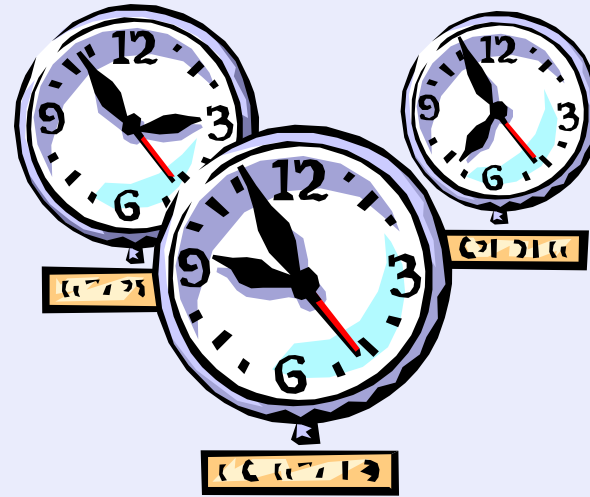
Culture Impacts

- How we behave

- How we interpret behaviors

- How and what we communicate

- How we give bad and good news

- How we ask and answer questions

- What "yes" means

- Our work ethic

- Quality standards

- And so much more......

Typical Barriers

- Clock
- Calendar
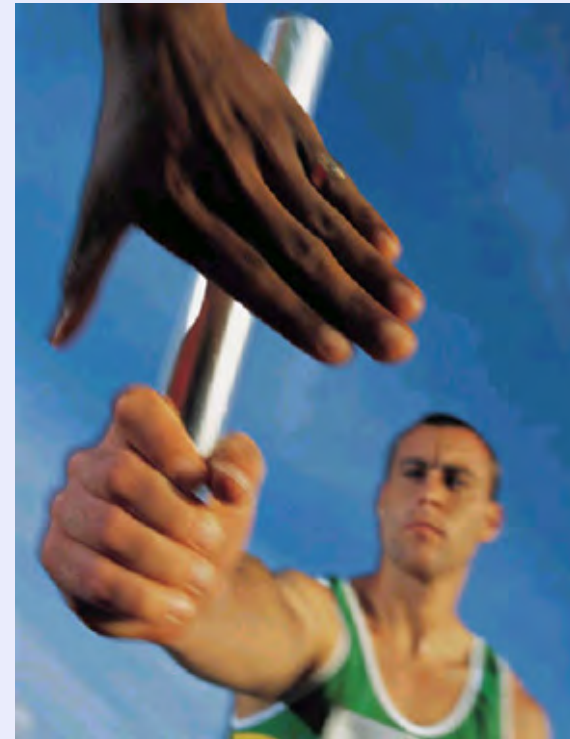- Decision Processes
- Ethics
- Rewards

Sources of Culture Clashes

- Lack of understanding, comfort, experience with people from different cultures

- Mismatched expectations

- Fear of reduced career opportunity

What stories, thoughts, advice do you have about culture?

Critical Aspects of Indian Culture

- Highly personal

- Generally too polite to say "no"

- Eager to please, loyal

- Others?

Critical Aspects of Filipino Culture

- Individuals act within context of group - collective

- Highly personal

- Try to avoid conflict

- Others?

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Facilitating

To make easy or less difficult; increased ease of performance of any action

…creating a process for making things happen well.

Virtual

- Being in essence of effect

- Not actual, but equivalent, so far as effect is concerned

- For all practical purposes

Meeting

- An act or process of coming together

- As an assembly for common purpose

What makes a meeting

effective, good, productive…

…and worth your time?

Attendees

Virtual people do not attend

virtual meetings…

…real people do.

Compare and Contrast

In-Person	Virtual

Becoming Great

Facilitating

Efficient and

Productive Virtual

Meetings

Facilitator Knowledge and Skills

- Basics of facilitation

- Fundamentals of virtual communications

- Reading silence

- Understanding cross-cultural dynamics

- Accommodating English as a second language

- Choosing and using communication technologies

Is planning more or less important for virtual meetings, compared to in-person meetings?

Meeting Planning and Preparation

✓ Be clear about the reason for meeting

✓ Define in advance objectives and desired outcomes

✓ Know the audience

✓ Set and communicate agenda in advance

✓ Agree on meeting protocols and handling of critical issues

✓ Clarify decision-makers and influencers

Factors Affecting Use of Technology

- Social presence

- Information richness

During the Meeting

✓ Start and end on time

✓ Start with a "roll call" or check in

✓ Review protocols/ground rules

✓ Review agenda at start

✓ Keep to agenda

✓ Regulate "air time" for all

✓ Summarize and recap often

During the Meeting

For each agenda item

- ✓ Clarify expectations for item
- ✓ Communicate role in issue
- ✓ Communicate relevant information
- ✓ Ask for each person's input
- ✓ Discuss implications at each site
- ✓ Ask: what don't we know?
- ✓ Poll each person
- ✓ Decide who will own it
- ✓ Clarify communication to others

Virtual Meeting Protocols

- Come prepared

- Pay attention

- Voice opinion, but allow others to do the same

- Electronics on inaudible

- Eliminate background noise

- Say name before speaking

- Be as precise and succinct as possible

- Avoid "hold" in case of music

- Allow for pauses/ silence

- No multi-tasking

Facilitation Tips

- Use attendee's names frequently

- Ask lots of questions

- Frequently play back what you hear

- If something needs to be talked about, bring it out

- Foster connections between team members

- At end, ask each person to summarize their own actions and impact of decisions

- Don't assume silence is agreement

- Intervene when someone is not following protocols

When English is a Second Language

Others must:

1. Listen

2. Translate

3. Comprehend

4. Formulate response

5. Translate/speak

Remember, it's harder to translate emotions and nuances

Americans Can Help

- Being cognizant of word choice

- Speaking slower with tonal inflection

- Being succinct

- Not interrupting

- Checking for comprehension

- Not dropping voice at the end of a sentence

After the Meeting

- Post minutes

- Document decisions and next steps

- Verify action items; responsible party; and time frames

- Follow up as necessary

In General, for Virtual Meetings

- ✓ Planning is more important
- ✓ Be explicitly inclusive
- ✓ Pay close attention to process

In Summary

Do your homework

- Know the landscape of those attending

- Prepare your agenda in advance

- Take time to agree on and follow protocol

- Follow up!

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Personal Reflections

In your notebooks, write down your thoughts on today's workshop:

- What did you learn today?

- What action(s) will you take based on what you have learned?

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For More Information

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