

WORKING VIRTUALLY

Transforming the Mobile Workplace

SECOND EDITION



Trina Hoefling

Foreword by Didier Elzinga



STERLING, VIRGINIA



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VITAL MIND-SET SHIFTS IN A MOBILE WORLD

“Learn how to see. Realize that everything connects to everything else.”

—Leonardo da Vinci

“It is not the strongest of the species that survives, nor the most intelligent that survives. It is the one that is most adaptable to change.”

—Charles Darwin

“The most dangerous place to make a decision today is in the office. I run most of my business from my phone. . . . Everything is connected, collaborative, and mobile.”

—Ulrik Nehammer, CEO, Coca-Cola

How we think defines what we see and how well we lead. Our mind-set limits or opens us to adapt. In 1996 Atlanta, Georgia, hosted the Olympics. Coca-Cola brought my company in to prepare for traffic congestion since their offices were located near Olympics events and hotels. We developed a temporary telecommuting work plan. Concurrently, we conducted a Telecommuting Readiness Assessment to see if this could be a pilot program from which Coca-Cola Corporate could implement a fuller virtual work solution.

The Olympics initiative went well, but they were not ready for telecommuting. The infrastructure, job analyses, and capabilities were in place. *The culture, however, was not.* In the mid-1990s, status and prestige were obvious at Corporate. Office grandeur, tailored suits—image mattered culturally as well as implicitly; it was a reflection of status.

No change plan could quickly change the hearts, minds, and egos of upwardly mobile managers. It was too much to go against a cultural norm that was, quite literally, grounded deeply in that building. Instead of saying no to telecommuting, however, leadership decided, *“No, not now.”* Culture,

especially perks such as large offices, had to change first to break a strong career incentive that was deeply woven into their way of being. Once perks began to decouple from office spaces, mind-sets changed, followed by cultural shifts. As years passed, Coca-Cola changed. It got virtual. CEO Nehammer, quoted at the beginning of this chapter, is a global leader, not in downtown Atlanta. The CEO is a virtual worker.

Visionary Leader or Nineteenth-Century Executive Mind-set?

The German Post Office held the first management conference in 1882, for CEOs only. The conference was for one purpose: to help CEOs not be afraid of the telephone. Nobody showed up. The invitees were insulted; the idea that they should use telephones was unthinkable—telephones were for secretaries.

The same story applies to executives not long ago about the personal computer. Today, everyone has multiple devices—computer, tablet, smartphone, all backed to the cloud—that simplify our smart lives. Technology is no longer science fiction; we’ve become the Internet of Things. The iPhone broke through in record time, an indication of the pace with which we adapt today. It took 76 years for the telephone to reach half the population. The smartphone did it in less than 10 years.¹ The iPad penetrated even faster. Ninety-six percent of workers use the Internet, e-mail, and mobile devices to work; 81 percent of employees spend an hour or more on work-related e-mail during the workday.²

Our behavior has shifted individually, and so has the virtually mobile, smart organization. The way Coca-Cola used the Olympics to explore a more virtual workforce is laudatory. It adapted its culture to fit the mobile workplace. Despite its entrenched incentives, Coca-Cola’s leadership saw what needed to happen—shift mind-sets to fit today’s world—and it successfully changed. How much has your mind-set shifted to match a virtually mobile work world?

TABLE 1.1
Mobile Work Mind Shifts

Mobile Work Mind Shifts
1. “Best Fit” Environment
2. The Network Is the Workplace
3. The Paradox of Meaningful Work and Looser Employment Ties
4. Reward Collaboration Over Individual Expertise

Organizations and leaders who are ready to thrive virtually adapt to create the best fit workplaces that support their people in achieving the organization's mission. As Table 1.1 shows, best fit considers the virtual and colocated work environment, organization culture, and teams structured in ways that fit the work being done.

Mind Shift #1: “Best Fit” Environment

In a virtually mobile organization with collaborative capabilities, the workspace is decided on “best fit” environments. Offices and team spaces are resources, not status symbols. People don't think of a designated work space (except their computers and devices), and work is an ongoing event based on responsibilities, not a physical place. Organizations are learning to do the following:

- Transform a virtual workforce into a functioning virtual organization with viable teams who find meaning and satisfaction from the work and colleagues—across time and distance—while producing results.
- Design business operations and works paces to be more collaborative and responsive to what workers need.

It may seem counterintuitive that groups can link more cohesively across time and space than happens typically in person, but it is counterintuitive only if you believe face-to-face interaction is essential to develop team trust. Face time can quicken relationship development, but it is not essential and potentially not even best, depending on the work performed. Many organizations function in a matrix today, meaning that managing multiple relationships is a core competency for everyone, not just managers or executives. Team members belong to multiple teams simultaneously—based on function, project, and customer initiative. Showing up for multiple team meetings by web conference, without leaving one's workstation, is a significant time-saver. Talent availability and bandwidth are less limited by a physical workplace more than ever.

“Best Fit” Organizations

“Best fit” organizations integrate operationally. Enterprise solutions enable people to work together in many ways, such as face-to-face conference rooms (colocated office space) that are web enabled (allowing virtual participation). This means an equal opportunity for integration of a distributed talent pool. Some teams are obviously virtual, fitting their organization structure

to accommodate distance, but other teams are less obviously so. In today's global marketplace, for example, most executive teams are virtual already, made up of leaders based on value, not place. Even if executive offices are colocated, executives usually have little face time, but connect virtually on a frequent basis. Department teams may be wholly colocated, blend office workers with telecommuters, or be completely virtual. When organizations realize how integrated and virtual we already are, redesigning office space and business processes for "best fit" happens naturally with little curve.

"Best Fit" Teams

How a team structures itself depends on the team's purpose. One structure does not fit all. Traditionally, employees were members of one "fixed" department and perhaps on committees, maybe stretch assignments. Today, multiple team memberships are common. Not only are organizations made up of networks of teams, but also team members are connectors in the network of teams.

Agile teams form and reform readily. The proverbial revolving door of rolling entry and exit needs leaders to jump-start team relationships. Seldom does a team begin and end together. You know you're a twenty-first-century worker when you've worked for five organizations in two years without changing desks! Team members are recruited for their expertise and influence, not based on hierarchy. Teams often share leadership and are somewhat self-directed. And most teams are, at least partially, virtual.

The First Path of virtual teams facilitates the fast formation and agility of high-performance teams because it follows the principle of "best fit." Members fit a team based on multiple factors, such as expertise, functional (perhaps political) representation, professional fit, or simple availability. Team membership may shift based on project stage or assignment to a customer or value stream. The team may include workers who go to a traditional office, telecommuters, and traveling employees.

Teams are also increasingly made up of members who cross organizational boundaries, including customers, strategic partners, contract specialists, or vendors. Cross-organizational alliances require "fitting" knowledge-sharing infrastructure to be secure while encouraging open sharing and protection of organizational boundaries, such as intellectual property and proprietary processes. "Fitting" includes facilitating easy cooperation across permeable organization boundaries while managing risk and learning to quickly fit together and be effective fast.

All this serves to increase team and organizational leaders' need to manage, onboard, and coach differently, enabling people to work where and how best fits them. In the coordination of team activities, the team members develop a way of working together that "fits" them.

Do you think Best Fit?

Mind Shift #2: The Network Is the Workplace

It is no longer necessary to go to a *place* to perform basic functions—buy, sell, train, collaborate, or recruit. LinkedIn has virtually replaced the long-form resume. Organizations can distribute organization learning fast through knowledge-sharing networks and online learning platforms. Integrated organizations leverage intellectual capital, making it available through the digital network. Virtual work gives organizations the agility to increase speed, expand expertise, and access strategic opportunities to better meet customer demands—with less expense.

Design thinking is evolving as business leaders rethink how to structure the organization into a network of collaborating teams. Virtual work is no longer a last resort to keep a good employee; it's not a compromise when people can't meet in person. It is not an overlay, a replication, or a poor substitute. It is our way of working. IT has transformed intranets to be more than a place to store our data and files; we connect there.

What Is the Network?

A company network is the culmination of basic virtual work processes and systems, and the people. It is the road, the car, and the map. Think of the network as how:

- Work is done.
- Teams are built.
- Knowledge is shared.
- Complexity is managed.
- Relationships are developed.
- Agreements are solidified and trust is maintained.

The organization is literally built around the interconnectivity of virtual, human, and electronic networks, not a physical workplace. We are hyperconnected already; we can watch *The Voice* on broadcast media, smart devices, and the Internet, all available 24/7. Why not leverage that hyperconnectivity at work? Why add 20% to the average person's workweek in commute time? Whether Samantha drives 10 miles to an office or walks down the hallway at home, she will be logging into the network, checking e-mail, handling correspondence, and responding to people—probably without talking to anyone. She is a virtual worker, regardless of whether she telecommutes.

Where do you work?

Mind Shift #3: The Paradox of Meaningful Work and Looser Employment Ties

This is a time in work history when we are less tied to our employers and not tied to a desk. The trend continues to loosen organization ties with shorter contracts. At the same time, we seek more connection with others. We're in a paradox in this increasingly virtual work world, where team members are more geographically and physically isolated, not only from their team but also from their organizations. The isolation of virtual work along with a short-timer mentality makes the virtual leader's job challenging.

Since the Industrial Age, managers have tried to motivate employees, so creating a motivating environment today is nothing new. Unfortunately, when surveyed, employees continue to say that we are failing to engage their hearts and minds. Many report feeling isolated from their teams, disengaged and unmotivated. Many hope to change to a job where they can engage and make a difference. The good news is managers and workers want to be part of committed, high-performance teams. The virtual challenge is that distance can slow down the onboarding and enculturation process if the organization isn't designed for inclusion and virtual collaboration, and if the manager isn't prepared to lead talent virtually.

Are you connected to your team and organization?

Mind Shift #4: Reward Collaboration and Openness Over Individual Expertise

Esko Kilpi, founder and principal of a leading research and consultancy firm working with the challenges of knowledge work and digital work environments, says, "The focus should now be on cooperation and emergent interaction based on transparency, interdependence and responsiveness. It really is a fast-and-loose world."³ Organizations are often well-connected digital networks, yet results prove teams aren't fully maximizing collaboration. One leading inhibitor is the organization's tendency to define a person's value by how much expertise she holds. Hiring contingent workers encourages skill-based hiring, and it makes sense. At the same time, a competency plug-and-play approach to team formation is only one prism of hiring a well-balanced team. It implies our unique expertise increases our value because of what we alone know, more than sharing our wisdom does. It's actually a disincentive to collaborate with the team. If a team member's value depends on unique

contribution, peers become competition, not allies. Workplace reward systems, compensation, and performance appraisal need to reward information sharing, not hoarding, and team performance as well as individual. Examine and structure your systems for collaboration, not vicious, hidden cycles of built-in internal competition.

Two Tenets to Enable Generosity and Openness

Colocated work environments facilitate knowledge sharing, accidentally and simply just by being present. Even in a mobile work world, knowledge is often shared due to proximity, timing, mentoring, or intentional alliances. Virtual work can create literal distance between knowledge and the people. Not only are workers left out and disengaged, but also performance is at risk when vital information isn't flowing, and people hesitate to ask for help virtually. Accidental communication is and always will be a part of how people learn and collaborate.

Tenet 1: Look for Spontaneous Connections With Your Virtual Team

Intentional knowledge sharing should be formally structured and rewarded, of course, but there is power in informal sharing. In the emerging and boundary-crossing global workplace, with the hyperconnectedness of “smart” devices and shared apps, it's easy to capture and share intelligence. It's easy to start team chatter and cross-team conversations by facilitating informal and accidental learning while helping people get to know one another. Currently, most knowledge sharing is reliant on the manager to facilitate (and sometimes learning and development departments). Having managers be the conduit to the team is just too slow, unreliable, and costly. Does your organization rely on managers to cascade organization communication? For the informal manager, virtuality may have introduced new constraints to cascading organizational news. Are your virtual teams as well informed as those who work at a corporate office?

Tenet 2: Structure Knowledge Sharing and Information Dissemination

Time is of the essence to shift organizations toward open collaboration, rewarding team success over individual excellence. Corporate America is vulnerable. As far as I can tell, most companies are not managing knowledge sharing and organization wisdom capture well, even though they could. I facilitate in the board room and engage and listen in the trenches. I “hear” into executive thinking while also “seeing” into the belly of the operational beast. What I see is unsettling—scary misalignment between a networked organization's strategic thinking and what gets rewarded in their everyday systems, processes, and management practices.

Simply put, if performance management, appraisal, and pay remain individually focused (and, therefore, competitive at its core), all the best collaboration tools and training won't be enough to get people to become part of high-performing teams. Authentic collaboration comes when people not only are technology enabled but also are connected to their team and care about team results as their first priority. They know if the team wins, everybody wins.

Open sharing, passing wisdom on to others, fundamentally changes a culture. It won't happen if it's not mapped to how people are paid. Traditionally, people were rewarded based on rugged individualism, on their proprietary wealth of knowledge. Today, hoarding expertise is a barrier to virtual teams and organizations. Unintentional virtual worker ignorance because of poor virtual communication risks performance. If a networked collaborative mentality is to emerge organizationally, generous sharing must be rewarded.

Boomers Are Taking Knowledge With Them When They Go

A second organization issue is a frightening vulnerability. People are retiring, letting organization knowledge leave when they do. Right now, one-third of baby boomers, the organization wisdom keepers and experts, are eligible to retire.⁴ If not actively managed now, much organization wisdom retires with them. I see strategic conversation, but not enough action.

At the least, encourage people to generously pass along the wisdom. Much "work" contribution is primarily mental, not muscle.

People Will Share What They Know—If

It shouldn't "cost" workers to cooperate; rather, they should be rewarded for being nodes in the network, connectors and coaches. Financially reward it. Social network analysis can directly, objectively measure who is a valuable node in the organization.

A robust knowledge management infrastructure also quickly enables people to access help when needed. Just as anyone can access a universe of knowledge through Google search, so should a virtual team member be able to access a wealth of organizational knowledge without leaving the workstation. Organizations that fail to technically integrate and culturally collaborate will never fully engage the workforce or unleash all the intelligence available. Too much will leave with the boomers.

How organizations address training also changes in a collaborative organization, and more so when virtual. Training is no longer reserved for "learning events." Information-rich employees become valued resources in the network—coaches and teachers. While classrooms and other synchronous

training opportunities still have value, so does the need for continuous and readily available modular learning on demand, anytime, often online. MOOCs⁵ and other on-demand learning portals⁶ are primary learning resources, cutting T&D budgets or redirecting budgets to strategic leadership and talent development, while providing vast resources to employees.

Open, collaborative cultures unleash potential for dramatic expansion of organization capability. Learning happens anytime through many modes.

How does your organization encourage sharing and collaboration?

How Do We Work Together if We're Working Apart?

Disengaged virtual workers are not only isolated but also dangerous.

At the management level, if distributed team members do not have a clear sense of how their work “fits in” with the overall plan, they risk disengagement and missed performance metrics. Individual efforts run a greater risk of being misaligned with strategic priorities and team goals, regardless of how hard individuals may be working. I’ve facilitated heart-sinking conversations when the worker and manager both realize that the worker was not laying off work, but feverishly working in the wrong direction. Communication had broken down.

Virtual work demands everyone’s commitment to communicating—listening and speaking up. How else will the team ensure everyone is working on the right track? This isn’t optional. The team depends on each other. Individually and collectively, the “virtual job” creates outputs that come from coordinating work, managing each other, negotiating competing priorities, and delivering team outcomes through coordinated efforts. Lead and communicate actively. Be a role model. Teamwork supports the adage that two brains are better than one. Workers who want to be part of high-performance teams also want a voice in defining the quality of their work lives and organizations. They want more than “just a job.” In order for any collection of individuals to function as a team that is able to respond, barriers need to fall between managers and employees, among the network of teams, across geography and culture, and within operations seeking efficiency while flexibly serving the customers. We’re in this together, communicating and connecting.

What Makes an Organization Come Alive and Take on a Life of Its Own?

A healthy organization community is a collective of what is held in common by its members, a “creation of some jointly imagined possibility.”⁷ A

company is not a thing that preexists, which people join to merely contribute “outputs.” It is a living organism that changes based on the collective beliefs and actions of its members. I’ve been with virtual organizations that are alive and buzzing, more like a beehive of collective focus. The air almost vibrates across the airwaves; nothing can disrupt enthusiasm and belief. And I’ve more often seen the opposite (it’s often why I’ve been called in). It’s so simple that most miss it.

It’s About Us!

Whether colocated or distributed, team members are more committed to the organization when they see how they contribute to its very existence, even if they contribute for only a short time. Their commitment may be to be reliable workers, and not to seek ambitious careers—to be engaged employees, happy when they are contributing.

Distance does not need to create distance. The virtual environment appears to risk increased disconnection and isolation, and it may, if the organization leaders do not:

- Shift toward a more systemic, integrated view of the organization, and communicate with everyone to know how they fit into the whole.
- Support the network infrastructure that facilitates hyperconnection.
- Actively support a culture where workers share in the rewards of team collaboration.

Leaders should encourage and help people develop relationships across and beyond organization boundaries, and bring people together digitally and face-to-face, synchronously (live) and asynchronously (when they work best). Organizations add value when talent is supported and well deployed.

In a virtual environment, traditional status barriers disappear, or at least become less visible—such as office size and other status perks—and unconscious cultural biases and even some office politics become less relevant. With fewer barriers to keep us apart, collaboration can thrive.

Don’t Wait for Them

You may not be in a position to affect operational priorities, and your organization may not have shifted mind-sets yet. You can do something. One leader had a “corner office status issue.” He proposed a plan to remove the status barrier by mandating work away from the office. People were to use the office as an exception, and be there less than a certain percentage of work

hours. This unusual move lowered the barrier to having conversations across status because of office floors, posted titles, or doors. The temporary mandate forced people to shift their habits, and, perhaps most importantly, it was applied fairly. Even executives agreed to the mandate. In this example, distance created togetherness.

Collaborative work cultures are often thought of as an organizational ideal—a value, not an operational requirement. Social time in meetings gets pushed aside for urgent agendas, for example. If people interacting is the actual process of work, and collaborative technology platforms are set up to help us function as a network of teams, then isn't now the time for us to get good at collaborating virtually?

As you read this book, ask yourself how you can better create the beliefs, habits, systems, and processes that develop teams you want to lead.

Notes

1. Bob Moritz, “Global Annual Review 2014: Technology Breakthroughs,” *PWC.com's Annual Published Review*, New York, 2014, p. 10.

2. Shane Ferro, “Virtual Labor Organizing Could Be How the Next Generation of Workers Get Unionized,” *Business Insider*, June 10, 2015, <http://www.businessinsider.com/the-century-foundation-wants-the-unionization-movement-to-go-online-2015-6>.

3. Stowe Boyd, “Esko Kilpi on the Architecture of Work,” interview published by Work Futures Institute on Medium, <https://workfutures.io/esko-kilpi-on-the-architecture-of-work-1b35f9fb4bc0#.n7ix4bqla>.

4. Dr. Tasha Eurich, “Generational Leadership,” Rocky Mountain Human Resource Professional Society, Denver University, Denver, CO, April 16, 2015.

5. MOOCs are massive open online courses, such as MIT's EdX online learning.

6. Lynda.com is currently popular.

7. John Niremborg, *The Living Organization* (New York: Irving Professional, 1993), 29.