
PREFACE

When we wrote the first edition of *Mastering Virtual Teams* in 1999, we had no idea that our timing for the book would coincide with the start of an era of geopolitical and economic factors that would “flatten” the world. It was only in reading Thomas Friedman’s book *The World Is Flat* (Farrar, Straus & Giroux, 2005) that we realized the scope of the convergence of megatrends that shaped a workplace where virtual collaboration had become the norm, not the exception. Consequently, *Mastering Virtual Teams* has had exposure in numerous countries and companies and among countless academics, students, and practitioners who operate in the virtual world that Friedman describes. His triple convergence of workers, workplace, and work processes necessitated multiple forms of communication and collaboration and the escalation of tools and methods for virtual teams. In the handful of years since our book was first published, we have moved from a few of us working on virtual teams once or twice a year to most of us spending some part of every day in a virtual experience. Surely, the next generation of workers will not use the term *virtual* and will be amused by the “olden days” when work was accomplished each and every day between people face-to-face and when the newest miracle of communication in the workplace was the fax machine.

With that said, communication and collaboration are still the two most important factors in team success. The virtual environment fundamentally continues to transform the ways in which teams operate. Technology introduces a critical variable that radically changes the choices for, and the effectiveness of, communication and

collaboration. For example, many of us have struggled through at least one boring and nonproductive videoconference in which the images lagged behind the audio to the point of distraction, and many of us have sent an e-mail or voice mail message in an emotional moment and had it misinterpreted by the recipient.

Crossing geographical boundaries also affects the ways in which virtual teams communicate and collaborate. The preference in some cultures to consider the individual first and then the team may make someone who has grown up in a more collective or group-oriented society feel uncomfortable with the independence of teammates. The practice of “saving face” in some cultures can make a slightly negative e-mail message about a team member’s work a terribly embarrassing experience. Significant differences in time zones often make virtual team meetings inconvenient for some team members.

Although we have the technological capability to work across time and distance and we dream of teams that leverage technology into competitive advantage, the fact is that we still need new competencies and practices to do these things. Leading and working in virtual teams require much more than computers and technology. Success or failure depends on the attainment of competence in and implementation of practices that facilitate working effectively virtually. It is no longer enough to just understand that technology or national culture affects teamwork; successful team leaders and members need tools, techniques, and decision-making strategies that work in a virtual environment.

Who Will Benefit from This Book

This book was created to provide the how-to for people who work in or lead virtual teams. It is targeted at people from large and small organizations as well as at individuals who work independently and need straightforward and down-to-earth advice to make their virtual teams successful. Readers from all cultures and all types of organizations can benefit from this book.

This book offers theoretical and conceptual information about working in and leading virtual teams as the foundation for more practical strategies. It contains many practical tools, including checklists, tables, and worksheets. It also answers some basic questions and offers strategies and techniques that are especially important for people who are new to virtual teams, for example:

- What types of virtual teams are there, and how does the type of team I work on affect how I work?
- How does a virtual team differ from a traditional team?
- How do I start a virtual team; what are the steps and important considerations?

- What are the technological options open to me, and how do I select the most appropriate ones?
- How do I select a technology that matches my team’s task, organizational culture, and team member experience?
- How do the various aspects of national, organizational, and functional cultures affect virtual team performance, and what can I do about them?
- How do I manage the interaction of culture with selecting and using technology, building trust, and team dynamics?
- What are the competencies I need to develop in order to work in or lead a virtual team?
- What is my role as a virtual team leader?
- What is my role as a virtual team member?
- How do I build and maintain trust among team members when we can’t see one another?

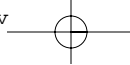
This book also provides more advanced information in the areas of team dynamics, virtual meeting facilitation, and working adaptively. It answers questions such as these:

- How do I plan for and facilitate a virtual team meeting?
- How do I leverage technology to make virtual meetings more effective than face-to-face ones?
- How do the dynamics of virtual teams differ from those of traditional teams?
- What are the other team variables, and how can I influence them?
- How can I design team interventions?
- What styles and leadership practices work in an adaptive and virtual environment?

Both of us work in or consult to bottom-line and results-oriented organizations in the public and private sectors. This affects the ways in which we view leadership and the roles of leaders and team members. Although it is likely that our biases will emerge at times and that our North American cultural perspective will show, we have tried to maintain broad and balanced cultural and organizational perspectives.

How to Use This Book

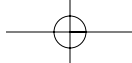
Mastering Virtual Teams has three parts. In Part One, “Understanding Virtual Teams,” we define and explore the complexities of virtual teams. We present the important factors that make a virtual team different from a traditional one. In Chapter One, we describe different types of virtual teams and present a set of critical success factors.



We offer team leaders and members recommendations for action to ensure that these success factors are in place. In Chapter Two, we sort through the myriad of information about technology, integrate it, and offer practical guidance about the different technological options available to virtual teams. We provide guidance about what works best in different situations and present criteria to evaluate the usefulness of each technology for a particular team. In Chapter Three, we examine the ways in which national, organizational, and functional cultures affect the performance of virtual teams. We also investigate how culture can be used to leverage performance and, on the darker side, how it can be used as an excuse for nonperformance. Part One provides a foundation for understanding the pragmatic advice in the remainder of the book.

In Part Two, “Creating Virtual Teams,” we present the nuts and bolts and the intricacies of starting a virtual team. This part provides straightforward suggestions, checklists, and worksheets about startup strategies that make virtual teams work. In Chapter Four, we introduce a set of myths and realities about leading virtual teams. We translate these into seven areas of competence that are critical for virtual team leaders. Each type of competence is accompanied by recommendations for developmental activities. A competence assessment is also offered as an individual development planning tool. In Chapter Five, we present a step-by-step process for starting a virtual team. This includes directions, checklists, agendas, worksheets, and techniques for obtaining sponsors, chartering the team, conducting team orientation meetings, team building with different cultural groups, developing team norms, using technology, and planning communication. In Chapter Six, we present two critical roles for virtual team members: autonomy and collaboration. We build a set of team member skills around these two roles and offer competence assessment tools and recommendations for personal development. In Chapter Seven, we cover the critical element of building trust in a virtual team environment. We also describe how trust can be affected by national culture and by the use of technology. This chapter presents a variety of tools, checklists, and exercises that are useful in building and maintaining trust.

In Part Three, “Mastering Virtual Teams,” we offer more advanced information for virtual team leaders and members. In Chapter Eight, we give recommendations for facilitating virtual team meetings. This includes methods for planning and running virtual meetings and for using technology so that the virtual meeting has the potential to surpass a face-to-face meeting. In Chapter Nine, we present a model of team development and team dynamics for virtual teams. We recommend strategies for tracking and diagnosing a virtual team’s effectiveness and provide interventions for dealing with typical problems of virtual teams. In Chapter Ten, we present a model for working and leading in adaptive and unpredictable situations. We also present eight practices that are factors in the success of virtual teams.



New to the Third Edition

The third edition has a number of new components. Given the reality of Moore's law, we updated the technology section to include instant messaging and personal computing devices. We have added more worksheets and checklists and updated some of the existing ones based on our experience. We have also deleted the specific references to particular companies and their practices and now focus more on ideas, concepts, tools, and methods. This is a reflection of that fact that many companies that were lauded in the 1990s are no longer on top or no longer exist. It is also a reflection of feedback that readers found the checklists and tools much more useful than the examples. Finally, we added a new section in most of the chapters, "Near Virtual Disaster." These stories of lessons learned are based on firsthand knowledge of problems that occur in a virtual world that did not occur in the real world. The rapid maturing of virtual teams has created a new and different set of problems and opportunities for digitized disasters.

Acknowledgments

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The people at Jossey-Bass define true virtual teamwork. In particular, we thank our editor, Neal Maillet, who helped us get this third edition up and running.



xvi

Preface

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