



Managing Global & Distributed Teams

presented to

 Central Mass Chapter of PMI
February 13, 2007

by

Rick Brenner

Principal, Chaco Canyon Consulting
Boston, Massachusetts, USA

Building State-of-the-Art Teamwork
In Problem-Solving Organizations

www.ChacoCanyon.com
rbrenner@ChacoCanyon.com

Copyright © 2007 Richard Brenner

Core Message

- Dispersed (distributed) teams present unique challenges
 - More chance for confusion and miscommunication
 - More difficult to monitor
- Global teams are even more challenging
 - Cultural differences enhance confusion
 - Greater likelihood of policy mismatch
- Managing a dispersed team successfully means
 - Doing things differently from face-to-face teams
 - Spending more money doing it
- We do it anyway because either:
 - The work is inherently dispersed; or
 - We're saving by not building a face-to-face organization

2

Roadmap

- The nature of global and dispersed teams
- Building and maintaining trust
- Planning communications
- Dealing with dispersion
- Accounting for socio-cultural differences
- Accounting for language differences
- Allocating the work with dispersion in mind
- Dealing with voicemail and email
- Making face-to-face meetings count
- Celebrating achievements
- Leading telemeetings

3

Dispersed teams vs. global teams

- Your team is dispersed if, to have a F2F meeting:
 - You have to use a transport vehicle of any kind; or
 - You have to walk more than two minutes; or
 - You have to go outside from one building to another
 - OR: You never meet face-to-face
- A global team is a dispersed team with:
 - At least one offshore element; or
 - At least two sets of laws; or
 - At least two sets of national holidays; or
 - At least two social cultures

4

Dimensions of dispersion

- The dimensions of dispersion:
 - Geographic
 - Temporal
 - Organizational
 - Demographic
 - Linguistic
 - Socio-cultural
 - Professional
- Each has its own effects

5

Dispersion has consequences

- Relative to F2F teams:
 - More difficult to detect malfeasance and hidden agendas
 - Wider variety of performance standards
 - Increased likelihood of communication problems
 - Increased time for “closed loop” communication
 - More confusion and more persistent confusion
- Global dispersion consequences
 - Greater cultural variation and greater distance separations
 - Team members still embedded in home cultures
 - More mismatch in work styles
 - Temporal mismatches
 - Calendar conflicts (holidays and religious events)
 - Linguistic variety

6

Best practices for managing global teams

- Regard early attempts as pilots
- Anticipate the effects of hierarchies of teams
- Recognize the Economic Paradox of dispersion
- Appreciate the accounting system illusion
- Develop dispersion-specific metrics, such as:
 - Cost of confusion-driven rework
 - Incidence of undetected malfeasance (currency-days)

7

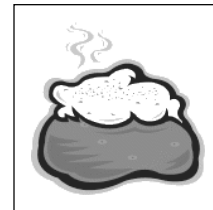
Trust-building tactics (1)

- Make people aware of cultural differences
 - Offer training in cross-cultural trust-building
 - Invest in building relationships
- Clearly define roles and responsibilities
- Let people get to know each other
 - Keep task groups small
 - Conduct kickoffs and chartering sessions face-to-face
 - Have face-to-face meetings periodically
 - Have a Team Family Album
 - Limit changes in team composition
- Eliminate coercive management
- Deal with serious conflict face-to-face

8

Trust-building tactics (2)

- Make space for family involvement
- Encourage travelers to stay with local team members in their homes
- Rotate meeting sites
- Rotate travel burden for day-to-day work
- Rotate the site for the telemeeting facilitator
- Monitor trust status by tracking:
 - Tweaking CCs
 - Voluntary turnover
 - Hot potato tiffs
 - Triangulation incidents
 - ...



9

Elements of a communications plan (1)

- Specify electronic infrastructure
 - Email lists, chat rooms
 - Virtual workspaces, virtual meeting spaces
- Training program for deployed technologies
- Standard protocols for
 - Telephone
 - Video
 - Meetings and telemeetings
 - Computer-based communications
- Metrics for communication effectiveness
 - Incidence of confusions (“Oh, I thought X”)
 - Incidence of I’ll-have-to-get-back-to-you

10

Elements of a communications plan (2)

- Localized software applications
- Define classes of communications
 - What goes to whom
 - Media: how messages get to the people who need them
- Roles, responsibilities, risks, budget, schedule

11

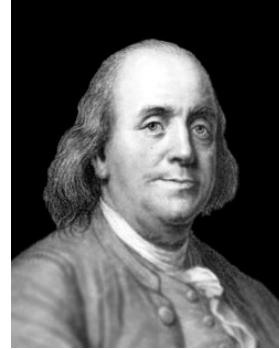
Consider adopting novel tactics

- Training for non-verbal communication
 - Structure of non-verbal communication
 - Cultural differences
- Training for specific media: audio, video, email
- Batch less-than-urgent communications
- Consider dropping landlines for people who are highly mobile
- Use video wormholes (great for celebrations)
- Create space for other-than-work-related communication
- Prepare for tragedy, both personal and work-related

12

Pick the right people and avoid the wrong people

- Problem-solving skill is not enough
 - Seek people with a knack for finding a “third way”
 - Seek problem-solving ambassadors
- Reduce number of layers
 - Use compensation to collapse layers of subs
 - Eliminate *pro forma* project managers



13

Be alert to organizational issues

- Anticipate organizational incompatibilities
 - Data access
 - Legal questions
 - Performance management/input
- Investigate recognition practices
- Beware fiscal timing mismatches
- Verify software applications compatibility
- Budget: additional driver fees for rental cars might apply



14

Manage dispersion risks

- Allocate extra budget and schedule (30%)
- Reduce split assignments to limit contention risk
- Monitor pressure gradients across split assignments
- Manage coherence risk by developing site teams
- Limit malfeasance risk by intervening earlier



15

Tactics for dealing with dispersion

- Make meetings as full-duplex as possible
- Delegate more deeply
- Define Team Standard Time
 - Use a time zone if:
 - Everyone observes the same daylight/standard protocol
 - There is a low level of split assignment
 - Otherwise: use Zulu time
- Know who's travel-capable at any given time
 - Passport, driver's license
 - Immunizations
 - Security clearances and visas
 - No imminent life-changing events



16

Strategies for dealing with cultural diversity

- Deal with team troubles
 - Minor problems don't go away – they become major
 - Approach from a cultural perspective
 - Intervene early
- Foster cross-site relationships
 - Limit turnover risk especially at interfaces
- Make your infrastructure compatible
 - Paper size
 - Fonts and software
- Be aware of rank – follow local custom



17

Tactics for dealing with cultural diversity

- Cultural diversity presents risk
 - Prejudice abounds
 - Humor doesn't export (or import) well
 - Train everyone in culture-specific differences
 - Vet metaphors and allusions
- Beware estimation risk
 - Historical effort data is culture-specific
 - Transplants work at home-culture rates
- Manage cultural risk of videoconferences
 - Non-immersion risk
 - Video training

18

Tactics for dealing with dates

- Define expectations about meeting dates and deadlines
- Have an inform-as-soon-as-you-know norm
- Define consequences of norm violation
 - Possibly contractual
 - Certainly personal performance
- Research legal and religious holidays
(There are about 40 calendars in use worldwide)

19

Strategies for dealing with language dispersion

- Designate a Team Language
- Designate a Meeting Language (per meeting)
- Have a translation plan
- Use professional translators
 - Even if they just “sit in” they can detect and resolve confusion quickly
 - Use translators with domain expertise
 - Avoid domain experts with translation expertise
- Verify document translations
 - Loop back to verify invariance of meaning for mission-critical translations
 - Use sampling to verify less-critical translations

20

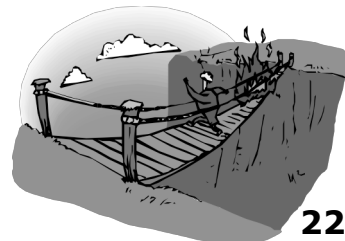
Tactics for dealing with language dispersion

- Use code names instead of acronyms, abbreviations and initialisms
- Specify an alphabetic sort order (about 20 alphabets are in use worldwide)
- Have a policy *vis-à-vis* localized software applications
- Take care with naming
 - Choose component, process, site and concept names with care
 - Files, directories
 - Email addresses and distribution lists
 - Domain and subdomain names

21

Strategy and tactics for module design

- Pay special attention to modules that span sites
- Align module interfaces with site boundaries
- Consider modularizing according to geography
- Beware inappropriate partitioning
- Deal with fluidity
 - Bring fluid modules closer together
 - Segregate fluidity
- Include IT in your project team



22

Tactics for email

- Define customs for email
 - Acceptable message response times
 - Use meta-responses
 - What topics are permissible
 - Who can participate
 - Criteria for switching to more direct media
 - Have a take-it-offline norm for scuffles
- Ban:
 - Tweaking CCs
 - Long, complex debates
- Ensure (in advance) passage through bulk email filters
- Always confirm – don't rely on silence

23

Tactics for voicemail

- Speak slowly
- Don't make up your message on the fly
- Leave only simple messages
- Say goodbye only once
- Say your phone number twice
- Don't give the time or date
- Press the button to hang up
- Learn your system commands (local and remote)
- Consider calling voicemail directly
- Define acceptable message response times
- Use meta-responses
- Always confirm – don't rely on silence

24

Tips for face-to-face meetings

- They're expensive
- Not having them is even more expensive
- Limit the attendance list
- Conduct retrospectives:
 - While the work is still underway
 - Immediately after you resolve an emergency
 - Invite "ambassadors"
- Allow time and space for socializing
- Create a program, not an agenda
- Preparation is important – require it of everyone
- Choose a venue that supports the work
- For long flights, fly business class

25

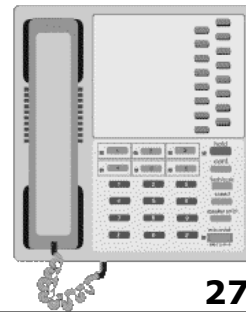
Celebrating achievements

- Evaluate celebration skills in F2F teams first
 - F2F teams are a less challenging context
 - If celebrations are deficient in F2F teams, fix that first
- Allocate organizational "Morale Fund" to teams
- Include a celebration in every F2F meeting
- Schedule celebrations near the middle of the stay
- Add recognition and honor to the mix
- Remember the people back home
- Consider conducting dispersed banquets
- Restrict celebrations to team-relevant events

26

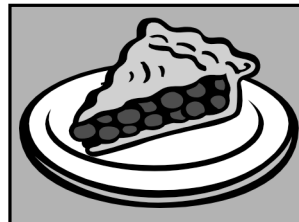
Strategy for leading telemeetings (1)

- Favor symmetric meetings
- In asymmetric meetings, proactively elicit contributions from tele-attendees
- Limit the attendance list
- Limit the objectives and the agenda
- Manage technology risk
- Use trailing-edge technology when possible



Strategy for leading telemeetings (2)

- Shift routine chores to pre-meeting activities
- Keep the meeting short
- Schedule generous breaks
- Designate a scribe and a timekeeper
- Hold some time in reserve
- Be prepared for collapses of prior agreements
- Don't ever tighten knots



Tactics for leading telemeetings (1)

- Send invitations early
- Arrive early and welcome arriving attendees
- Choose passwords judiciously
- Avoid speakerphones
- Enforce the timeline – be ruthless
- Circulate a program, not just an agenda
- Get training for meeting technologies in advance
- Set up a test meeting and leave it open for a day ahead of time
- Tailor exhibits to the needs of telemeetings

29

Tactics for leading telemeetings (2)

- Include on exhibits a URL for downloading
- Line number for complex documents
- Highlight key portions of exhibits
- If you take a break, keep the connection alive
- Get IM addresses for all attendees with speaking roles
- Skip the round-the-table introductions
- Establish norms for contributions:
 - Introduction
 - Handoff
 - Three-exchange limit for dialogs
- Use podcasts

30

Subscribe to my free newsletter: Point Lookout

- Weekly email newsletter
- 500 words per edition
- Free
- Topics:
 - Communications
 - Meetings
 - Project management
- <http://www.ChacoCanyon.com/pointlookout>

Or: Write “subscribe” on your business card

31

Resources

- This and other related topics:
<http://www.ChacoCanyon.com/>
- The handout:
<http://www.ChacoCanyon.com/pdfs/pmi-central-ma.pdf>

32