



The following best practices for virtual teams were gathered from Third River Partners Serving Leadership content, the experiences of our client friends and other helpful resources. Please feel free to share with your virtual teams to help them operate at their very best. *Your friends at Third River Partners.*

5 Useful Dimensions for Virtual Team Success:

1. **A Mindset for Virtual Teams**
2. **Virtual Team Structure, Rhythm & Momentum**
3. **Connection & Culture in a Virtual Workplace**
4. **Wellness for Virtual Teams**
5. **Effective Use of Virtual Collaboration Technology/Tools**

A Mindset for Virtual Teaming Success- - *Useful Ideas to Choose From*

Think About It:

Proactively shaping productive thinking regarding virtual teams is an important starting point. Helpful thoughts to consider:

- Virtual teaming will not be going away, and likely expanding. As such, our job is not to run from virtual, but to embrace appropriate uses for it.
- No two Individuals will experience virtual work environments in the same way. Some will love it, some will not, some will be in the middle.
- There is a special energy and structure required for successful virtual interaction. As humans are wired for connection, we are not looking to replace- but to humanize the virtual process and leverage it in motivating and useful ways.

Some helpful questions to invite productive ways of seeing and thinking about virtual teams:

- *“What have we learned and experienced about virtual methods in the past months that we desire to hang on to? Where might virtual be just as- or possibly more- effective than in-person interactions?”*
- *“What ineffective or frustrating practices that were a part of co-located working can we leave behind? Where can we create more effective and motivating pathways forward using virtual methods and tools?”*

Virtual Team Structure, Rhythm & Momentum- *Useful Ideas to Choose From*

Think About It:

A goal for virtual teams is to not only replicate remotely what happens in the office; rather, to create best ways to work effectively and in a motivated way together when all are not physically present each day with one another. Consistency, predictability, routines, and rhythms will help team members to increase control, lessen anxiety, and build high levels of confidence and productivity.

Recommended Practices	Detailed Ideas
1. Block out shared team collaboration and Individual Flex Time	<ul style="list-style-type: none"> • Create shared anchor blocks of time when all team members are available to collaborate as useful. Where possible, map to the natural cadence and rhythms which occur in the traditional workplace. • Budget and allow daily “flex time” hours for individuals to deal with unique home bound challenges (e.g., checking in with school aged children doing at home learning, etc.). • Identify and schedule in advance daily/weekly/monthly/quarterly/annual meetings (e.g., Project status, business development, etc.). Knowing these blocks in advance will allow team members to proactively schedule other important professional and personal (e.g., vacation) time in a non-conflicting way.
2. Create both focused and uninterrupted working time, as well as open time to connect	<ul style="list-style-type: none"> • Agree to a desired (to shoot for) % of time (weekly or semi-weekly) devoted to meetings, working time, business development, personal development, etc. Determine daily/weekly meeting-free times, no meeting days and possibly text/messaging free times as well. • Schedule daily “Open door” hours for team members to connect with one another as helpful.
3. Provide virtual Team-based Planning, Execution and Continuous Improvement frameworks & Tools	<ul style="list-style-type: none"> • Provide frameworks and tools where collective thinking and ideas can be efficiently shaped into action plans. • Provide frameworks and tools for teams to conduct rapid improvement reviews. • Customize processes for receiving & giving feedback to fit the unique challenges of a virtual delivery environment.
4. Increase purposeful check-ins and coaching	<ul style="list-style-type: none"> • Clearly define team goals and each individual’s contribution so that individual work can be done effectively. • Increase frequency of short, focused team check-ins (e.g., 15-minute check-ins each morning specifically focused on most important work for that day). • Increase frequency of individual check-ins and point of need coaching. Balance check-ins to be both personal “how are you doing?” as well as business progress focused (e.g., goals for last week/month, this week/month, next week/month. Progress? Working? Barriers? Ideas?). • Call just to check in on how someone is doing (separate from work), especially if you sense they are struggling.
5. Create regular Learning/ Development/Innovation Time	<ul style="list-style-type: none"> • Use collaboration platforms to structure onboarding resources where newer team members can quickly obtain important information on key priorities and projects, important acronym dictionary, organization and team structures, team member bios, metrics and other useful tips and techniques. • Schedule frequent “mini-learning” events around how to succeed as a team in general, as well as virtual teaming-oriented topics (e.g., new technology features and other virtual best practices). • Create regular times for innovating what the team can do to create a more satisfying working experience, deliver more powerfully to customers, etc. • Invite project teams to create podcasts to share highlights of their work (these can be like a Ted-Talk, or even humorous, e.g., like using the theme of a popular TV show).

Connection & Culture in a Virtual Workplace- *Useful Ideas to Choose From*

Think About It:

The sense of belonging to something bigger/greater than self is a significant motivator of the human experience. Many virtual teams have found success because they were together in a common location previously, had formed personal relationships, and gained an appreciation for the culture of the organization from being in the larger building/group setting.

Recommended Practices	Detailed Ideas
1. Create individual connection to know each other deeply	<ul style="list-style-type: none"> ● Distribute face sheets with useful professional and personal info (e.g., contact info, work anniversary, birthdays). ● Share Individual Team Member “Blueprints” (Values, Strengths, Work Preferences, etc.). ● Use technology to create a “Virtual Water Cooler” space to share life happenings. ● Share “My Virtual Work World” Tour (your workspace, special items of meaning, etc.). ● Conduct rotating “Favorites” sharing (teams, movies, vacations, songs from a decade, activities, photos, games, TED Talks, etc.). Create a guessing game to match the favorite to the person. Reward winners with gift cards. ● Share Meaningful Moments or “Best experiences you never want to have again”. ● Create regular onsite meetings at common team locations. ● Conduct rotating “Virtual Lunch Dates” to get to know each other better. Talk about something non-work as well, like dream vacations, what you would do with a month of paid sabbatical, etc. ● Celebrate individuals’ birthdays with “What we appreciate about you” sharing on a team call.
2. Create team connection and common unity (community) that can be leveraged for success	<ul style="list-style-type: none"> ● Co-create an inspiring Team Greater Goal. ● Design and send team “swag”, e.g., beverage cups, nice pull-overs, custom screen savers, desk items, etc. ● Virtually introduce Support Partners (HR, IT, Finance, etc.) on live video to establish connection. ● Complete and discuss assessments to share strengths and styles (StrengthsFinder, Enneagram, Disc, etc.). ● Host monthly themed “Virtual Happy Hours”, themed dress days, Holiday parties. etc. ● If working with multiple other teams, create a themed event where each team can introduce their purpose, priorities, and members to one another (e.g., “Featured Team Fridays”).
3. Create appreciation for company culture	<ul style="list-style-type: none"> ● Share Culture Stories- History of the organization, heroes, critical moments, what the company esteems and rewards and what they look down upon, etc. ● Values Spotlight- Highlight a key value for each month and have team report out on how they intentionally put that value to work.

Wellness for Virtual Teams- *Useful Ideas to Choose From*

Think About It:

Wellness has been an important topic to attend to in co-located working environments; and it is especially important to purposefully promote and practice in virtual environments where individuals may not be together personally for extended periods of time. One often considers wellness as a physical thing; we suggest that it is also important to pay attention to mental, emotional and relational wellness as well.

Recommended Practices	Detailed Ideas
1. Physical Wellness	<ul style="list-style-type: none">• Provide guidelines, equipment, budget for proper ergonomics (posture seating, computer height, lighting, etc.).• Create active physical routines (5 minutes up for every 30 sitting, take speed walks, neck stretches, walk stairs, watch/phone breathing app, stand/walk for call where video is not required).• Repurpose commute time for physical workouts/activity if possible. Quick lunchtime workouts can also be effective to create energy for the day. There are many workout apps available to structure this time. a• Commit to eating better and for energy because you can now do so in your own home in a way that would not be as convenient in the office.
2. Emotional Wellness	<ul style="list-style-type: none">• Provide and advertise company resources and other helpful support information to help with home based challenges which can be stress inducing (e.g., single team members who are not having enough interaction with others, parents who must now juggle children at home, caring for elderly relatives etc.).• Establish routines and set smaller goals that you can realistically accomplish. Celebrate those accomplishments.• Create separation from working time (start and end times, lunches, breaks, etc.).• Create “ramp up” and “close down” routines; perhaps simulating some things done when commuting to and from the office (podcast, think time, etc.).• At mid and end of workday, intentionally reflect on an important progress/accomplishment you made as well as unexpected positives experienced (what went well for you?). Additionally, where are you more informed and smarter in how to approach the tasks that matter most to you? Where are you proud of yourself? How has working in a virtual situation been a benefit for you?• Create “un-busy” times to reflect healthily and proactively on what matters most and how to create the time and focus to get there.• Purchase an “open” and “closed” sign to hang by your office space. Put away work items at the end of the day if your home work situation is in a more public space.• Surround yourself with photos (physical or scrolling technology) that bring you joy (people, places, events, etc.)• Create and listen to playlists of inspirational and special memory music as you work.• Intentionally design laughter into each day by viewing a source of humor (e.g., YouTube videos of a favorite comedian, or connecting with a humorous person you know). If not distracting to others, occasionally use functionality in collaboration tools which allows for funny backgrounds (perhaps a theme day).• Focus on things you can control, and use empowering self-coaching thinking and language (what is possible? What can I do? What will work?).• Schedule regular vacations and time off if possible (e.g., a Friday afternoon off monthly or every other month to restore can be a great benefit in addition to longer vacation times).

Wellness for Virtual Teams- *Useful Ideas to Choose From (continued)*

Recommended Practices	Detailed Ideas
<p>3. Social/Relational Wellness</p>	<ul style="list-style-type: none"> • Have a designated person looking out for team morale (e.g., “Happy Team Ambassador”), sharing upbeat team information and checking in with team members to see how they are doing personally. • Schedule time with someone each day for live human connection (phone or collaboration technology if not able to do so face to face). Catch up with those who you enjoy and may not have spoken to in a while. • Schedule a few times a week just to touch base and catch up with someone personally who is positive and helpful and puts a smile on your face. • Use activity feeds on virtual collaboration to announce upbeat social information (birthday or work anniversary posts, significant accomplishments, etc.). • Create and attend fun team time (virtual themed happy hours, etc.). • Have members on the team identify some inspiring movies of overcoming and have them discuss as a group. • Have team members read helpful books on working together as a team and discuss as a group. • Establish a confidential relationship with a trusted other where you can reach out for help and share your challenges. This can be someone at work, or a friend or family member. Each week, ask for help and offer help to another person at least once. • Touch base with neighbors who you may now be seeing more of as many are working in home settings. • Nothing beats getting people together live in the same place! As circumstances allow, create regular times where the team can be together face to face (office or other common location) on a regular basis as is possible (e.g., monthly, quarterly, etc.). Make these meetings a combination of work and play.
<p>4. Psychological Safety</p> <p><i>Psychological Safety is described as the ‘condition in which you feel (1) included, (2) safe to learn, (3) safe to contribute, and (4) safe to challenge the status quo- all without fear of being embarrassed, marginalized or punished in some way.’ In essence, you feel safe to be yourself and voice your opinions in your team.</i></p>	<ul style="list-style-type: none"> • Create processes and practices where team members feel comfortable raising and discussing potentially controversial issues that impact their success. • Validate members taking the time to share by recapping what you have heard them saying to ensure understanding and to acknowledge their contribution. • Show interest for and respect of one another as human beings and not just work mates. Ask them about their lives outside of work and share your life with them as well. • Demonstrate appropriate risk taking personally to others on the team. • Utilize structured review practices which allow learning from failure without blame or finger pointing. Create “Learning from Failure Forums” where team members can share things they struggled with, and what they are seeking to do differently so that other team members can support them. Remind the team that failure is often a necessary step toward ultimate success. • Give others credit when meeting with influential people. • Communicate: “What are your strengths that the team can count on you for?” • What areas of improvement are you seeking to pursue that others can help you with? • Make it OK to be more graciously direct in communications, as remote can lead to more miscommunications. • Identify and hire for profiles that work best in virtual work environments.

Virtual Collaboration Technology & Tools- *Useful Ideas to Choose From*

Think About It:

Technology in a virtual environment provides the platform by which team members connect to, collaborate and create work products with one another. As with any technology, the tools themselves will not provide success alone. As such, it will be important to use this technology and tools in a way which also pays attention to and promotes intentional human touch in interactions, and emulates the effectiveness of in person practices.

Recommended Practices	Detailed Ideas
1. Provide seamless equipping and support for virtual collaboration	<ul style="list-style-type: none"> • Provide “virtual in a box” complete set up (laptop, headset, camera, printer, etc.); also, budget for other important ergonomic items (chair, laptop stand, wireless keyboard and mouse, phoneline/phone? etc.). If team members will obtain their own equipment, provide an appropriate stipend to do so. • Clarify who to call for help with problems. Introduce that person(s) via virtual meeting to the team. to establish a personal connection. • Have Tech Support create “Common Issues and Fixes” job aid reference for virtual collaboration technology tools being used. • Have a central collaboration platform that the team uses as a hub for information/working (e.g., MS SharePoint).
2. Use a variety of virtual medium	<ul style="list-style-type: none"> • Use a variety of medium (video, phone, email, text, chat). and do not overload on email or text. • Remember that it takes effort to pay attention to faces on the screen for extended amounts of time; an occasional break from the camera can be refreshing.
3. Follow helpful virtual meeting etiquette	<ul style="list-style-type: none"> • Clarify meeting type. What is the purpose of the meeting (content creation, info sharing, market intelligence, decision making, etc.)? When is a full team or sub-team needed? • Co-create agendas in advance. Use pre thought, pre-read, pre-watch resources to make most efficient use of meeting time, and to allow participants to come to discussions with informed thinking (especially where decisions will be deliberated and made). • Have agreements around multi-tasking (e.g., phones, emails, texts, split screens, etc.). What is appropriate? Not appropriate? When appropriate? • Time presentation to 10 min and 20 min for every half hour of time; 5 min and conversation to 45 min for every hour of time. More frequent shorter meetings may be more effective than longer meetings. • Use “Timed Talk” of 2 min or less per comment, and “Round Robins” to ensure that each person has a chance to offer their thoughts on important topics before any one member speaks twice. • Define and rotate facilitator(s), moderator, producer, note taker etc. roles for meetings. • Use a variety of tools to keep participants engaged (breakout rooms, chats, surveys, whiteboards, etc.). • Use dynamic docs on shared spaces for multi-participant entry (e.g., Word or PowerPoint on SharePoint, or Google Docs or Sheets on G-Drive) to simulate live flipchart brainstorming. • Use “Pulse Checks” before moving to new topics to gauge how team is feeling about progress. • For longer meetings (e.g., 1-2 days) arrange for food to be delivered to, or budget for participants to do so. • Leverage virtual tools to record meetings for playback to reinforce to-dos or catch-up those who were unable to make the meetings.

Virtual Collaboration Technology & Tools- *Useful Ideas to Choose From (continued)*

Recommended Practices	Detailed Ideas
4. Effectively see one another and be seen by one another	<ul style="list-style-type: none">• Use “Cameras On” approach as a predominate default (remembering that it may be refreshing to have cameras off at times). This may require team members to become more comfortable with showing up on camera sometimes in more casual states.• Be mindful of background that might be distracting to others (e.g., “propeller head” if sitting under a ceiling fan, “dark out” if sitting in front of a bright window, etc.).• Be more aware of your own body language. What would not usually be demonstrated in a live setting (a critical facial expression for example) could easily surface unintentionally in a virtual setting when you are not mindful of being on (or off) camera.• If possible and based on group size, arrange video tiles on the top of the screen close to the camera so that you can see faces and speak directionally toward the person vs. to the side or below them.• Use settings in virtual platforms where all can be seen together (e.g., multiple tiles in Zoom or Microsoft Teams “Together” Mode).

In addition to Third River Partner’s approaches and the experiences of our clients, we found the following sources helpful:

Articles:

<https://blog.getcroissant.com/blog/2016/10/7/how-to-foster-psychological-safety-in-remote-teams>

<https://www.hubspot.com/careers-blog/building-psychological-safety-virtually>

<http://cavemaninasuit.com/4-questions-that-build-psychological-safety-virtual-team-toolkit/>

<https://www.businessinsider.com/how-to-work-from-home-during-the-coronavirus-outbreak-2020-3>

Books and Ted Talks:

The Culture Code: The Secrets of Highly Successful Groups (Daniel Coyle)

The 4 Stages of Psychological Safety: Defining the Path to Inclusion and Innovation (Timothy Clark)

The Fearless Organization: Creating Psychological Safety in the Workplace for Learning, Innovation, and Growth (Amy Edmondson)

On-line Presentation and Set Up Strategies :

https://www.youtube.com/channel/UCdjkNbX2XWf2vkkyI_qWZMA