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## A PRIMER

# Managing Dispersed Work Effectively

*By John D. Adams*

**T**HE NUMBER OF work groups whose members are NOT working most or all of the time in the same place is growing rapidly as changes in technology have enabled flexible work styles and created a truly global economy. It is not unusual for a manager to be in one location, and her/his team located in several other places around the world. In a rapidly growing number of organizations, **dispersed teams** are the norm, especially in sales and service functions. Assisting in the creation and building of such teams represents a huge opportunity for OD practitioners virtually everywhere in the world. The purpose of this article is to present some research-based recommendations for managing dispersed work as effectively as possible, for use by both OD practitioners and dispersed team managers.

Technology tools have enabled many additional forms of dispersed work, including: home offices, drop in work centers, offices with fewer

work spaces than employees, temporary task teams, and "virtual" team meetings. (See Table 1, next page.)

While much has been written about "Virtual Teamwork" and the dispersed worker, (e.g. Bleeker, 1994; Duarte & Snyder, 1999; Faucheux, 1997; Lipnack & Stamps, 1997) relatively little has appeared so far that specifically supports the manager of a "virtual" or dispersed team. I recently had the opportunity to conduct an action research project to determine which managerial practices contributed to success, and which to failure, of dispersed work.

Over the course of three months, I interviewed thirty managers representing a variety of functions, levels, and locations across this high-tech company. I also attended a workshop on "Virtual Teamwork" offered by the corporate education center, and followed up by holding telephone interviews with seventeen of the employees who had attended. The

focus of all my interviews was on people’s experiences with dispersed work and on identifying the best management practices for developing and maintaining successful dispersed teams.

The remainder of this article summarizes what I found to be the most important practices for the successful management of dispersed teams in the following five areas:

- Management Style
- The Remote Employee
- New Employee Orientation
- Meetings
- Teamwork

If you are a manager of a dispersed team, you are invited to use these ideas to self assess your own performance. If you are an OD consultant, these guidelines should help you in coaching clients who are managing dispersed work.

*Most of the suggestions and practices contained in*

*this article are also essential for effective face-to-face teams. However, it is important to note that dispersed work magnifies the benefits of the presence, and also magnifies the difficulties caused by the absence, of the practices and qualities described below.*

**MANAGEMENT STYLE**

One key finding was that whatever style a manager employed, the greater the degree of “dispersion” of her or his team, the more exaggerated that style became. Those who were thoughtful and systematic developed conscious practices to take the dispersion factor into account, and generally fared pretty well. Those who were haphazard usually experienced chaotic conditions and were unable to generate successful results from their dispersed teams.

**Table 1: VARIETIES OF DISPERSED WORK**

<b>HOME OFFICES</b>	Many companies provide computing systems and high speed Internet connections for employees, to enable them to work from home some or all of the time. In some cases, fax machines, telephone lines, copiers, and other office equipment are part of the “work from home” package.
<b>DROP IN WORK CENTERS</b>	These are generally located near areas where many employees live in larger metropolitan centers. Centers support workers not having to commute during traffic rush hours. They ordinarily consist of cubicles with workstations and phones, plus copiers, faxes, group meeting spaces, etc. In some cases, these centers also have a receptionist/space manager to provide support and assist in allocating appropriate workspaces.
<b>UNASSIGNED WORK SPACES</b>	In situations where many of the people assigned to a given location are away from the office for extended periods (e.g. consultants, sales force, service engineers), it is more cost effective to provide fewer workspaces than employees, allocating some proportion of the office to “unassigned” workspaces. These spaces are reserved much like a hotel room when the traveling employee is in the office. The most forward thinking versions of this concept provide a rich variety of unassigned individual and team workspaces – not just a “sea of cubes” – to support a wide range of in-office work needs.
<b>TEMPORARY TASK TEAMS</b>	The nature and speed of today’s complex projects often requires that people with specialized capabilities be assigned temporarily to one or more project teams. These teams often consist of employees from several functions and disciplines. Someone who is not the full time manager of any of the team members frequently manages these temporary teams.
<b>ELECTRONIC CONFERENCING</b>	It is often necessary to hold meetings with many of the meeting attendees located remotely. In addition to the now ubiquitous conference call enabled phones, there is a huge range of products available to support dispersed meetings, including internet assisted meeting templates, interactive overhead projectors and whiteboards, and a variety of videoconferencing systems.

Two of the most clear-cut overall findings about management style were never to **sit and wait** for things to “work themselves out,” or for resources to “appear;” and never to allow dispersed employees to be **taken by surprise**. Regular check-ins and updates are essential to keep the team working smoothly. In the absence of these, project management quickly regresses to “fire-fighting” and momentum disappears.

**COACHING AND FLEXIBILITY:** In dispersed work, coaching is the recommended style of managing, for improving performance, leveraging strengths most effectively, stretching the attainments of high performers, and redirecting off-target performance. In all of the dispersed work situations I reviewed, coaching employees worked better than “telling” them.

**RESULTS FOCUS – DELIVERABLES:** Managing for results means that expected deliverables, deadlines, and results must be as clear as possible. Based on my findings, I urge managers to hold regular progress reviews, both individually and with the whole team. The amount of “face time” with employees is less critical than establishing clear goals and holding regular reviews. For example:

- These are your ten accounts
- Here are the expected outcomes for each account
- These are the decisions you can make on your own
- We will hold weekly team meetings and monthly one-on-ones to review progress and solve problems
- Here are my telephone and pager numbers – call me when you need me

**ISSUES AND PERFORMANCE PROBLEMS:** Problems must not be allowed to go unresolved, as “molehills” become “mountains” very rapidly in dispersed work situations. Since distance magnifies the complexity of an issue or a performance problem, it is essential to “clear the air” as soon as you realize that something is amiss. Remember also that sensitive and complex “discussions” are seldom concluded successfully by e-mail.

When a dispersed employee’s performance is

not meeting expectations, his/her manager should:

- Increase telephone contacts
- Increase number of one-on-ones
- Build and use informal networks to detect problems early
- Use face-to-face coaching to generate quicker results
- Explicitly track results
- Change the job and/or compensation

If performance continues below par, cancel the dispersed arrangement (such as discretionary telecommuting), bringing the employee into your immediate work area for a period of time for more direct supervision.

**TECHNOLOGY TOOLS:** Technology tools supporting dispersed work will continue to evolve rapidly. While it is not necessary to adopt every new tool invented, it is essential to ensure that everyone on your team can use whatever tools you have adopted: workstations, laptops, pagers, remote telephony, reservation systems, shared calendars, shared files, ...

This area is an important one for OD people who have coaching relationships with managers of dispersed teams. The most usual result of helping a manager become more explicit in her/his practices is that team performance improves.

#### THE REMOTE EMPLOYEE

Much research has been conducted within corporations to ascertain what makes employees successful in dispersed work situations. My own research project confirmed what has been found by a number of studies. (e.g. Bredin, 1996 & 1998; Curran & Williams, 1997; Jackson & van der Weilen, 1998; Nilles, 1998). (See *Table 2 next page.*)

It is important that OD practitioners help client managers understand the traits that predict success for remote employees.

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**NEW EMPLOYEE ORIENTATION**

When employees join a dispersed team (whether through being hired, an internal transfer, or a reorganization) if they are not familiar with the dispersed work “terrain,” an explicit, high quality orientation is essential to get the person up to speed and contributing effectively. This is an area I found to be frequently overlooked. It is far too common that new, specialized resources are brought on board, and then left alone to pick up the team’s ways of doing things “by osmosis.”

Very strong “self starters” who have made a number of job changes, and who have worked previously in dispersed settings, may be able to get themselves functioning fairly quickly. Most people flounder for longer than is necessary, as their managers and team members have forgotten how different the work landscape looks when one is newly arrived.

In the hyper-fast pace of work today, many managers overlook the fact that new employees have particular needs when they join a new group, and that these needs are magnified when the new group is a dispersed one. OD consultants should help their clients work with the following points when selecting new employees for a dispersed team assignment.

**MANAGER:** It is essential that the hiring manager begin preparing for the arrival of a newly hired employee as soon as the job offer is accepted. This includes getting badges and security clearances ordered, stocking the person’s workspace with basic materials, getting technology tools ordered and installed, and so on.

A detailed summary of the dispersed work environment should be given to the new hire prior to arrival, so that he or she can form clear expectations. A “guide” or mentor should also be assigned to the new hire before his or her arrival, to guide the new employee through the first month or so.

Finally, the manager is encouraged to contact the new hire a day or so before arrival to describe the agenda for the first day. This contact should not be delegated to an administrator.

During the first week, the manager should ensure that:

- All administrative procedures are completed
- All requirements, guidelines, and procedures are reviewed
- Appropriate training and meetings are scheduled
- Charter, deliverables, and how to stay in touch with key people are reviewed.

I have found that a majority of younger new hires do best in the long run if they are not placed

**ORIENTATION FOR NEW HIRES – HIRING**

**Table 2: REMOTE EMPLOYEE SUCCESS AND FAILURE FACTORS**

<b>SUCCESS FACTORS</b> <i>Those remote employee qualities that most often predict work success include</i>	<b>FAILURE FACTORS</b> <i>The remote employee qualities that most often predict work failure include</i>
<ul style="list-style-type: none"> <li>■ Strategic direction is sufficient (i.e. big picture and clear deliverables)</li> <li>■ Good communicator, maintains contact</li> <li>■ Good at building relationships, committed to being a team player</li> <li>■ Reliable and trustworthy</li> <li>■ Disciplined, results focused work style</li> <li>■ Able to work independently, a self-starter – willing to “bite the bullet” and review consequences at next update opportunity</li> <li>■ Problem solver and decision maker</li> <li>■ Assertive and confident</li> <li>■ Good time management skills</li> </ul>	<ul style="list-style-type: none"> <li>■ Needs tactical direction (i.e. what to do next), uncomfortable with ambiguity</li> <li>■ Poor at communicating and staying “in touch”</li> <li>■ Too independent – not interested in the rest of the team</li> <li>■ Haphazard style of remote manager</li> <li>■ Unable to maintain focus on results</li> <li>■ High needs for social inclusion</li> <li>■ Inflexible approach to work</li> <li>■ Doesn’t push back</li> <li>■ Blames others for problems with work</li> <li>■ No access to technology tools, or doesn’t use them well</li> </ul>

in a remote or dispersed situation for the first month or so.

**ORIENTATION FOR NEW HIRES – MENTOR/GUIDE:** The Mentor/Guide coordinates all meetings for the new hire for the first month or so, and facilitates the completion of all administrative procedures. In addition to making sure that the new hire gets to know all of the team members in residence, plus other people who are important to the team, the guide also ensures that all technology tools are in place, and that the new hire knows how to use them and what to expect from the dispersed working of the group.

The guide's most important role is to acculturate the new hire and explain who to go to and how to get things done. It is important that the guide check frequently for retention and understanding.

I found many cases in which bringing the new hire to the work location of the group's manager was not feasible at the time of hire. Frequently, another manager or specialist at the remote location served as the new hire's mentor. Additionally, it is exceedingly important that the remote new employee receive assistance in joining the appropriate "shared interest" networks (sometimes called "communities of practice") at the remote location. (Allee, 2000).

## MEETINGS

Meetings are the times when dispersed teams "come together." Successful meetings are an exceptionally critical aspect of managing dispersed work. If team meetings are scheduled regularly, and are well planned to contribute to the essential work of the team, they can be one of the major success factors for the dispersed team's effectiveness. If meetings are haphazardly planned and do not contribute to the core work of the team, then there is a good chance that the team will fail. OD practitioners who have experience in designing and facilitating effective team meetings can make important contributions here.

**FACE TO FACE MEETINGS:** All team members should understand that meeting attendance is

expected – in person. The most successful dispersed team managers held quarterly meetings at which attendance by everyone was required. These meetings were rotated, so that each team member's location was a meeting site on a regular basis – even if the site was quite remote and only a single team member was located there.

**INFORMAL "WATER COOLER" TIME:** When team members are dispersed, the informal conversations that happen "around the water cooler," over informal lunches, or in the hallways are missing from at least some of the team members' work lives. These conversations are often catalysts for new ideas and breakthroughs. It is essential, when "all-hands" face-to-face meetings are called, that plenty of informal, unstructured time be built into the design of the meeting to allow for remote members to catch up socially. Dispersed team managers must fight the urge to schedule every minute with formal work. The unstructured time is where the best conversations often take place!

One manager in my study insisted that every full time teleworking employee conduct her/his work from the team "center" for one week every other month to allow for these remote team members to catch up on the team's social life and to benefit from at least some of the informal interactions.

**VIRTUAL MEETINGS – CONFERENCE CALLS, DATA CONFERENCING, VIDEO CONFERENCING:** When some of the team members cannot be in the meeting room, there is a wide array of rapidly evolving technology tools available. When using conference calls, data conferencing (e.g. chat room), or video conferencing, it is essential that the agenda and ground rules for meeting behavior be made explicit in advance – especially prohibitions from "double-tasking" during the meeting. For example, during conference calls, a rule that all computer monitors be turned off may be needed, in order that all team members make themselves fully available for the meeting at hand.

**COMMUNICATIONS – E-MAIL:** It is not possible to manage by e-mail! E-mail is a great medium for sharing information and making announcements. It is a very bad medium for handling difficult situ-

ations and attempting to resolve conflicts. Short, clear e-mails that utilize itemized lists and specify the kind of response expected are the most effective.

**COMMUNICATIONS – THREADED CONVERSATIONS:** There are many web-based tools available that allow for team members to post items for discussion, and for responding to discussion items. These processes don't substitute for face to face handling of complex issues, but they allow for more complexity than e-mail.

**COMMUNICATIONS – FORMALIZED:** Formal practices should be adopted for providing each other with regular updates of progress and relevant information. Regular "Transfer of Information" sessions should be built into every meeting. This creates a regular mechanism for sharing what has been learned in each team member's "communities of practice" for the benefit of the rest of the team. The team should collectively decide how to best keep everyone informed – and then stick to it.

**COMMUNICATIONS – KNOWLEDGE MANAGEMENT:** Regular "round-robin" sharing of highlights, challenges, and tips at regular group meetings is a good way to spread the "tacit" knowledge team members are acquiring from their work and from their networking with others outside the team.

Good knowledge management relies on team spirit and trust. When these are present, team members will be most likely to share their learning and insights. When team spirit and trust are absent, team members are more likely to withhold information and ideas that would be extremely helpful to others.

Each team should be aware of what its knowledge management needs are for:

- *Capturing* information
- Assuring *access* to this information
- Building team norms that nurture and reward knowledge *creation*
- Insure that each individual's knowledge and capabilities are *utilized* fully

## TEAMWORK

Teamwork is talked about a lot these days, but is often ignored in the frenzy of fast-cycle environments. All too often, it is "individual heroics" that get the rewards, even though it is clear to us in OD that teamwork could generate even higher levels of creativity and breakthrough performance. In coaching managers of dispersed teams on teamwork, I have often made use of the old TQM adage "Go slow to go fast." In most teams, especially dispersed ones, there are plenty of examples of how the individual heroics approach to group work has led to the need for major reworking of a project.

**NEW TEAM FORMATION – CHARTER:** Newly forming dispersed teams need to be clear about their charters and goals from the outset. A first team meeting should address at least the following:

- Team purpose
- Shared and individual goals
- Time lines for goal accomplishment
- Ground rules for functioning effectively as a dispersed team
- Information and knowledge sharing needs and norms
- Operational guidelines (meeting frequency, outcomes, agenda format, rules, and roles)

Team development: Schedule regular one-on-ones and face-to-face meetings. Team identity can be built and enhanced by holding specific events to build the team (e.g. monthly team breakfasts, social outings, team building retreats), and by creating subgroup tasks that require people to work together. Follow up on all action items and agreements to engage in new practices reached at team development sessions. Dispersed teams are even less likely than face-to-face teams to carry out "off-site agreements" back on the job.

It is also important in dispersed teams that every member understands the roles, responsibilities, deliverables and challenges of every other member. One way this has been accomplished is through job rotations, in which every team member does her/his job from another location within the team for two weeks every year. The manager must also locate him/her self temporarily in the various dispersed locations on a regular cycle.



**HIGH PERFORMANCE VIRTUAL TEAMS:** In my research, I found several qualities that were almost always present in acknowledged high performing dispersed teams. Use these qualities as a checklist for assessing your team's readiness to be a high performing dispersed team.

- Relentlessly customer-centric (including "internal" customers)
- Clear purpose to which all team members are committed
- Understood and agreed-to specific goals
- Shared understanding of the team's guiding principles
- Clear and agreed rules and procedures for decision making and problem solving
- Explicit procedures for ensuring regular information flow and knowledge management
- Use of effective project management tools
- Everyone's roles, responsibilities, and deliverables understood by all
- Coaching/facilitating approach to performance management
- Continuous learning through regular reviews of what's working and what could be improved in the team's operations
- High levels of team spirit, trust, and mutual respect

## SUMMARY

As mentioned earlier, dispersed work tends to "magnify" the impact of every manager's approach to managing. Effective face-to-face managers, with consistent and clearly articulated supervisory practices, generally fare pretty well when they move to

a dispersed team format. Managers with haphazard approaches to their supervisory duties (which is NOT a rare occurrence!) generally have a great deal of difficulty when they try to manage in a dispersed work situation.

While all of the practices reported in this article would most likely make a positive contribution to managing a face-to-face team, they become increasingly important as the amount of dispersion (number of remote people, frequency of absences from the assigned workplace) in a team increases.

I found that many managers take their management skills for granted, and then are puzzled when their dispersed teams don't function the way they expected them to. The most frequent response is to try harder with the same managerial procedures that aren't working, with the hope of different results (this is often referred to as a definition of "madness"). As OD professionals in a rapidly deploying world, there are many contributions we can make to ensuring that dispersed work is as effective as it can be.

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