

Virtual Leadership— Closing the Distance

Many of the skills trainers already use in creating a successful classroom experience are applicable to overcoming the challenges leaders face in a virtual environment. **BY ROSS TARTELL, PH.D.**



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Years ago, I was managing a team and had one remote direct report. She was in New York City, and I was 50 miles away. I remember how we struggled to keep her informed and included in the life of the team. The world has changed a lot since then!

It is no secret that a geographically dispersed workforce is now an everyday reality. In a 2012 study conducted by the Society for Human Resource Management (SHRM), 46 percent of organizations polled used “virtual” teams. And it is no surprise that the highest percentage of virtual teams was reported by multinational organizations. But as widespread and necessary as these geographically dispersed teams and jobs are to organizational success, their performance can be uneven.

Managing virtually is a challenge—and requires something new from the leader. Repurposing old skills and frameworks will not work in this environment. So if you are a manager, how do you approach this virtual world?

Kevin Eikenberry and Wayne Turmel of the Remote Leadership Institute offer a three-part framework to drive the success of a virtual manager:

- **Leadership and management:** The traditional competencies
- **Tools and technology:** Communication and media
- **Skill and impact:** Effective use of the tools

And there’s a fourth area Eikenberry and Turmel don’t discuss but that is vital to successful virtual teams:

- **Organizational context:** The formal structures and expectations within an organization.

LEADERSHIP AND MANAGEMENT

Virtual leadership changes the context of the relationship between the leader and the team. The richness inherent in face-to-face contact becomes a different experience when the workplace is virtual.

Communication and influencing are more difficult because the cues necessary to “read” the person or situation often are missing or off camera. Relationships and accountability must be created by design, since people can’t bump into each other in the hallway.

Research by Gordon Schmidt, published in *Industrial and Organizational Psychology*, highlights three critical areas of emphasis for the virtual leader:

- More task-relevant information must come from the leader, because non-verbal cues and tone of voice often are missing from the interaction.
- Increased communication frequency and regularity enhances the richness and depth of understanding. The result is the ability for the team to recalibrate action and increase team performance.
- Stronger personal relationships among team members support virtual team performance. It is the responsibility of the leader to facilitate the creation of these personal and social connections.

Steve Kontra, vice president of Global Learning & Development at Pfizer, Inc, brings the academic findings to life. He notes, “As a manager, you must think beyond the task, instruction, or the activity and focus much more on enabling real conversation. This means practicing intentional, focused, and undistracted listening. This requires asking probing questions and listening for the real meaning behind the words—something that can be even more challenging when managing or working with colleagues from different countries or cultures, where there may be as much meaning in what is *not* said as in what is spoken.”

TOOLS AND TECHNOLOGY

WebEx, Lync, join.me, Facebook, Twitter, Yammer, instant messaging, Skype, and FaceTime are just some of the communication tools available. A leader needs to select the right tool to create personal connections and provide necessary information. Eikenberry and Turmel highlight two

factors that drive the technology selection decision: richness and scope.

Richness relates to the range of information and cues provided by the medium. Something like Cisco's Telepresence is so rich that the team feels like they are in the same room, even if they are separated by oceans.

Scope relates to the reach of the technology. For example, an e-mail can be distributed to thousands of people in an instant, but it lacks visual and auditory cues.

To achieve the necessary impact, the leader must be thoughtful about choosing the way the message is delivered.

SKILL AND IMPACT

You can't be virtual without using technology, but most managers are not proficient in its use. As Turmel points out, while 87 percent of managers say that online meeting tools such as WebEx and Lync are mission critical, only 10 percent say they're competent and confident using those types of tools.

Low technical proficiency leads to sub-optimal results. Gretchen Gavett at the *Harvard Business Review* cited an InterCall study to report what people actually were *doing* during a conference call:

- Getting other work done: 65%
- Sending an e-mail: 63%
- Eating or making food: 55%
- Going to the restroom: 47%
- Texting: 44%
- Checking social media: 43%

Skill and impact can separate the average from the extraordinary leader—and ensure the engagement and performance that are necessary for success.

This is where training professionals—with their strong virtual learning skills—can make a significant difference. Cindy Huggett, a virtual learning expert, outlines a few techniques used by successful trainers; these same techniques can be used by virtual leaders:

- **Prepare:** Remember the “6 Ps” of project management? Prior proper preparation prevents poor performance. Huggett delineates three categories of preparation:
 1. *Know the audience:* Understand the individuals on the team, their work, their challenges, and their questions.
 2. *Technical:* Master the software, the equipment, and the necessary tools. Extraordinary virtual leaders likely use a headset and check the lighting so their Webcam image is clear.
 3. *Backup:* Have a contingency plan for power failure or other technology glitches.

- **Engage an unseen audience:** A virtual environment lacks the richness of stimuli or feedback that is characteristic of a face-to-face setting, so leaders must intentionally connect with their teams.

Pfizer's Kontra adds that his practice was to conduct regular virtual meetings with team members and create conditions that closely imitated a live, face-to-face meeting. For example, he ensured that each person had a voice and was given an opportunity to contribute to team discussions. He used simple techniques such as a “roll call” to solicit opinions and comments from everyone so each person felt important and heard.

Other engagement techniques involve the use of functionality inherent in most tools such as polls, raising hands, chat, pointers, asking verbal questions, and using people's names.

ORGANIZATIONAL CONTEXT

A common fear among virtual leaders is: How do I know how my team is doing?

Rob Rawson, co-founder of global recruitment platform staff.com, points out that it's important to have formal organizational systems in place so everyone knows how to enter their time, share information, make decisions, and have a consistent way to report their work. Kontra goes on to point out that “a real team, virtual or not, has to feel invested in each other. Having common goals creates shared accountability and builds cohesion.”

In a virtual world, a leader must be crystal clear and highlight the formal organizational expectations and processes, so people know what to do and can be held accountable.

WHAT'S THE TRAINER'S ROLE?

As a training professional, you can have a significant impact on a virtual leader's performance, especially because so many of the skills trainers already use in creating a successful classroom experience are directly applicable to overcoming the challenges faced in a virtual environment. These include:

- Logistics preparation for a long-term blended learning strategy
- Virtual meeting facilitation skills
- Use of virtual meeting tools

Virtual leadership presents a tremendous opportunity for the trainer to go beyond merely closing performance gaps. As a trainer, you have the opportunity to fundamentally alter the leader's capability to drive the engagement and performance of the team. **1**