

## Leading Virtual Teams

Guest was Nancy Settle-Murphy

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A renowned expert in the fields of remote collaboration, global teams, and managing wide-scale organizational change, Nancy Settle-Murphy is a popular author of articles, white papers, ezines and booklets. Her articles have appeared in publications such as *The Meeting Professional*, *Mass High Tech*, *IT Executive Journal*, *PM Network*, *Association Management Magazine* and *Intercom*.

Drawing from more than two decades of experience in facilitating the work of global teams, Nancy leads highly productive working sessions designed to efficiently and effectively tap the best thinking of key contributors working across time zones, locations and cultures. Among her recent clients: Hewlett-Packard, IBM, Shell Oil, Greenpeace International, Medco Health Systems, Partners Healthcare, Unilever, and the Consortium for Energy Efficiency.

Nancy is an active member of the International Association of Facilitators, the Massachusetts Innovation & Technology Exchange, Boston Facilitator's Roundtable and American Society for Training and Development.

Nancy authored the book, [Leading Effective Virtual Teams: Overcoming Time and Distance to Achieve Exceptional Results.](#)

## **Transcription of Podcast**

Joe: Welcome, everyone, this is Joe Dager, the host of the Business901 podcast. With me today is Nancy Settle-Murphy. She is the President of Guided Insights and a renowned expert in the fields of remote, collaboration, global teams, and managing wide-scale organizational change. Nancy recently published the book, *Leading Effective Virtual Teams*. Nancy, I would like to welcome you.

Before we dive in, tell us what you mean when you say a 'virtual team', because that term can mean a lot of different things to a lot of people.

Nancy: Thanks, Joe, and it's my pleasure to be here today.

So virtual in this context really means remote teams, so that means where at least one if, not more members of a team work physically apart from other members. A virtual team in this context could mean that everyone except for one person is working in the same location, or it could also mean that almost everyone is either working from home or working from satellite offices. So in this case, it means geographically dispersed or distributed teams.

Joe: Your book, "*Leading Effective Virtual Teams*", is it just for leaders, or if I'm a participant in a virtual team, should I read it?

Nancy: Sure, for a couple of reasons. One, virtual teams tend to be flatter, i.e., made up of peers. Let's say it's a large-scale project team; the leadership might change

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hands many several times depending on what phase you're in. Oftentimes you can be a leader of a project team or a virtual team one day or one month, and the next month or the next day you might be a participant. So that's one reason I think, the tips are applicable. In addition, to be a fully contributing member of a virtual team, oftentimes you do have to set up meetings from time to time or lead a particular phase of a project, so in that regard, you're almost always leading some aspect of this virtual conversation.

Joe: What makes leading a virtual team so challenging? If we're a good manager already, is it different?

Nancy: Well, it's very different. A lot of the same management skills are indeed transferable from the co-located team world to the virtual team world, but a few aspects of leading a virtual team makes it a lot more complex and challenging. First is the lack of opportunity for real-time conversations. Certainly face-to-face conversations are very rare, if not non-existent for many virtual teams. In addition, same time conversations via phone are often rare simply because of time zone differences or complexities in scheduling conversations. So the fact that you have few opportunities to exchange facts, opinions, to hear the emotion, that can really make building relationships and cultivating trust very difficult.

Second is the absence of visual cues, the ability to read your face when I'm delivering tough news or for you to read my face when I'm expressing some kind of frustration or displeasure with your current work habits. Those conversations that are difficult face-to-face can be enormously awkward and painful when delivered virtually.

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Joe: Let's say I'm appointing someone to lead a virtual team. Are there certain qualities that would be different than what a regular project manager, I would pick to lead a project within my organization?

Nancy: Yes, there are a few that come to mind. One is exceptional listening skills. By that, I mean you need to train your ears to take over all the other senses. You don't have the ability to see people and to see their facial expressions, so you need to be able to know when to listen, when to shut up, and when to just be quiet and often let the silence take over until someone does speak. It's the ability to listen hard for what's being said through the tone of voice and also what's not being said.

The ability to ask powerful, thoughtful questions, for example, you're leading a team meeting and you ask, does anyone have any issues with this, or is there anything I can help with? In many situations, people will not say a word. Either they're embarrassed to say they need help, or they don't really know what you're asking or they're afraid of being chastised for any number of reasons. So instead, ask a question like, let's go around the virtual table, and I'd like to ask what's the one thing that you would like to get from your fellow team members or me for the coming week? If you could name one thing, you had a magic wand and what could we give you? So to ask a question like that and to think about it in advance is incredibly important because you need to know what information you need from them, what information they need to share, and the ability to ask the question in just the right way makes a world of difference.

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Joe: One of the struggles I always have is that when I communicate, I probably simplify things and do more of a sound bite than the normal person. I'm not one to write a long paragraph on something. When I do that virtually, sometimes it's taken out of context, and I have to go back and clarify, no, I didn't really mean that, I meant that. Do you need to over elaborate in your messages? I mean, can we just Twitterize everything, or do we need to write longer emails when we're working virtually?

Nancy: That's a good question. I think it depends first of all what cultures you're working with. Some cultures and I'll generalize here, let's say German, Austrian, Swiss, and oftentimes those of us in the U.S.; we like, and we crave details. So, when writing emails and when speaking, you often need to be more explicit. But putting aside the cultural differences, when you work as a virtual team, whether you're a team leader or a team participant, you do need to be achingly explicit to make sure I really got what you said, and gee, now that I think about it, I didn't really understand what Joe said, and I have no avenue for which to ask Joe until maybe our next team meeting, or maybe if I'm lucky enough to get you at your desk if I call, which would be a very rare thing. So you need to think in advance what information do people need, and if you're working with a cross-cultural team, how do I make sure that when translated in and out of the local language, the message is clear? How do I give a message in such a way that the chances for misinterpretation or confusion are minimal, you don't have another chance oftentimes?

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The other point I wanted to make based on the example you gave is the power of paraphrasing. A virtual leader needs to be able to very quickly – and this is a skill that takes a lot of time to practice and to really hone – and that is I need to be able to translate what someone said. I don't mean into another language. I mean to paraphrase to make sure that point that Cindy just said, or Jose just said to make sure that we all understand it in the same way while we're in a real time conversation. If I believe that either due to an accent or due to someone saying something that really wasn't quite clear, but I think I understand what they said, it's up to the virtual team leader, or it could be up to any of the team participants, to say it in a different way and to validate that everyone understood that important point the same way.

Joe: So when you direct a message, you should ask for feedback as a matter of practice to make sure that they were all on the same page?

Nancy: Yes, and there's a way of doing that. If I asked, for example, did everyone understand that point I just made? You probably will hear dead silence, especially if some of the team members are reluctant to admit that they didn't understand or feel that they're the only ones who are in the dark. So instead, I might ask, I'd like to go around the virtual room and ask for one comment or one key point or one ah-ha based on that point you just made. That way, I have a way to kind of test and validate understanding in a way that's non-intrusive, that isn't awkward, that isn't embarrassing, and helps me understand whether I need to re-communicate the point a different way.

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Joe: It takes a lot of preparation before the virtual meeting if you are the leader to; I don't want to say script your meeting, but very much plan your meeting out. It may even be more important than it is to walk into your daily meetings in front of everyone.

Nancy: Well, I actually think it's more important for two main reasons. One is virtual meetings tend to be brief. We have a lot to do; we want to get on and off the phone, assuming you use a phone, which is at least one tool used to conduct these meetings. The other reason is we don't know what the rest of the team members are doing, and chances are; they might be doing their email or plugging figures into their latest project plan. So, for a couple of reasons, virtual meetings have to be extremely well orchestrated and tightly run.

You need an agenda. If it's a standing meeting and the agenda is predictable, it may not be as important to send it out each time. If it is not a consistent format, it's critical that everyone knows what they're coming to the table to discuss and that they are prepared for that meeting.

In terms of scripting, sometimes I actually do script my meetings. What I script are my questions. If I know I need to flesh out some ideas about a particular aspect of a project we're working on, I want to have my questions prepared in such a way that I can get some really good ideas in an easy way from everyone on the phone as quickly as possible. I want my questions to energize them. Many times, I want them to be provocative. And most times, I want to hear something from everyone. There's really an art to asking



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questions. It's very difficult to do on the fly; at least I have a hard time coming up with great questions at the moment. So, I always like to have a pocket full of questions written down in front of me just in case.

Joe: I go back to something that I've carried in my wallet for 30 years. I'm dating myself – maybe not quite that long, maybe 25 years. It's the ability to – what you want in a conversation; it's all of three words: know, feel, and do. What I want a person to know, what I want them to feel, and what I want them to do. Is that a good way to look at it when I'm going into a virtual meeting?

Nancy: I think it's a great way. And the 'know' part, because virtual meetings have to be so short, I'm really big on creating a level playing field. By that, I mean I want everyone to come to the virtual table from the first minute of conversation knowing the same thing when that's possible. So, for example, if it's important, everyone understands what the status of the project is or what our deliverables are, or what our forecasts vs. actuals are, whatever the conversation is, I want to give them a place to find that information before we sit around the virtual table. I do not want to use our precious meeting time for bringing people up to speed if there's another way I can do that. So to create that knowledge that knowing, in advance, virtual meetings, as I mentioned before, have to be brief. They have to be well run, and they have to be focused, or people will start multi-tasking. So you need to ask, what is it. I want everyone to know before this meeting?

The 'feel' and the 'do', I think those are really important questions, and that's something that I need

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to figure out. How important is the feeling in this meeting? For a particular meeting where we're going to talk about changes to the organizational structure and the governance of the project, and I know these changes are going to rock the world of a lot of people on this call, then yes; it's going to be very important to me to ferret out. What are they feeling and what is important for them to feel? So, I want to design the conversation to help me find that out and to help them perhaps express their feelings.

In terms of 'do', I need to really make sure that I'm very clear, and everyone is clear in advance of this meeting what actions will be needed from whom when we end this call. So the 'know', 'feel', and 'do', I think that's great. I'm picturing a little triangle, or a circle that I could use to map my next meeting. I love that.

Joe: One of the things that we talk about when it comes to teams and even virtual teams is teamwork.

Nancy: Sure, there's teamwork. I think one of the challenges of a virtual team leader is to really think about who needs to work with whom, on which tasks, and for what purpose. If you have a very large project team, let's say 15 or so people, some may know each other from previous projects, or it could be that most people don't know each other. The fact is certain people probably need to cultivate relationships and trust with a few others more than they do with certain other people on the team.

When I'm a virtual team leader, I want to be very thoughtful about who I need to work together and have their own conversations. By conversations, I don't

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mean IM's and getting in a portal and writing back and forth, though that of course is one way, they need to communicate. But I mean a real time conversation, because, in my opinion, that's really how trust and relationships are built. I need to think about who does need to work with who, and who needs to have which conversations with whom to build those trusting relationships.

There are some tasks where lone wolves, or independent people, can work off to the side with very occasional conversations of many different types with their team members. So, there are some tasks and some roles that more lend themselves and actually require very intense collaboration, and other tasks or perhaps phases of the project where independent work will be more important. I think a virtual team leader really has to assess that out right up front.

Joe: You bring up something there that – when you talk about a virtual team of 15, that's got to be pretty difficult to manage. Is there an optimal number that is difficult or that you should try to break up into groups of four or five that actually work together? Is there any rule of thumb there?

Nancy: I have a couple of rules of thumb. One, it's very difficult to have a true conversation with everyone having equal weight and everyone fully contributing with more than six people. Let's assume your meeting is no more than an hour, and most project team meetings I run or help design are at most 60 minutes. What I always ask myself is what kind of conversation do we need and for what outcome, who needs to be involved in the real-time conversation – which I'd

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recommend no more than six or seven – whose input do we need in advance, later, or both?

It is possible, for example, that we need an intense discussion so that we can make a go/no go decision about implementing new-product capabilities that certain clients are demanding, but we know the effect that will have on the budget and the deliverable date, so we need to decide. All 20 people, let's say on our extended project team really can't be in that conversation either because everyone doesn't have equal weight or because that would-be way too chaotic to have that kind of conversation with that many people. I would ask myself who are the decision makers, who needs to be involved in the real-time conversation? But also, who needs to weigh-in advance, who needs to weigh-in once we've made a decision, and maybe we need to open it back up if there're some good reasons to. I think it depends on the conversation.

I will add that if you use a virtual collaboration tool during the real-time conversation that allows people to type in ideas or to weigh in or to vote or to prioritize, there are ways of including more people. But still, for the verbal conversation, probably no more than six. For brainstorming ideas, that is, idea generation, real right-brain thinking, the optimum number is somewhere between five and seven.

Joe: I can pretty much follow my Jeff Bezos' Two Pizza Rule. If it takes more than two pizzas to feed a group, you've got too big of a group.

Nancy: I've never heard that before, but I like that.

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Joe: One of the things that you brought up earlier that I think is important is that idea of trust. It's really easy to get to know someone and trust someone when you meet them face-to-face. But virtually, it seems even more important to have trust, but it seems 10 times harder to build.

Nancy: It's much harder to build because we don't have the opportunities for those social conversations. As you drift into a conference room when you work face-to-face you might say, hey, how was your weekend, or hey, you look tanned, where did you go on vacation, et cetera. In a virtual world, you have to find; you have to make those little slices of opportunities where you can get a fuller sense of that human being beyond the task list, beyond his or her role.

Some examples I like to use: if you have a team meeting, a real-time conversation, it might be asking a question as everyone gets on the call, and a different question each time. A question that's not intrusive or awkward. It might be something like, describe what you can see if you look out of your closest window to where you're working right now, or describe the best meal you've had in the last 30 days, or what book have you read in the last six months that you'd recommend to your colleagues, it could be a fact or fiction, et cetera. So if you think about – and this is something else I keep a list of always and kind of tick off the questions –ask one question. It doesn't take more than three or four minutes for everyone to answer. And not everybody has to answer, but it's just a way of adding a little of color to that black and white flat picture that we otherwise get. It's adding shading and colors. So,

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that's one idea is to ask those check-in or check-out questions.

Another one is if you're an organization that uses IM, maybe sending a group IM when you come in asking how everyone is, or to say what you're wearing that day. Just a little social information, a little reaching out to create that sense that everyone is a team even though you're all working differently.

Joe: Sports are an overused analogy, but there seems to be such a direct correlation between trust and teamwork. I see it in my son's gaming, which we talked about in a previous conversation. That trust in the other person is developed. I think through respect for each other; it has to be nurtured through practice and playing together. Are there ideas of how you build that respect for each other? Because there's got to be a certain confidence in that other person that really builds that virtual team and that teamwork involved.

Nancy: You bring up a lot of good points. First of all, I think trust does have to get built. I'm an eternal optimist, but I believe that most people come into a new relationship with neutral trust. If I don't know you, I have no reason not to trust you, but I don't really have a reason yet to trust you. I come in wanting to trust you and essentially trusting you unless you prove that I shouldn't. I think one important aspect of trust is to understand from the different people on your team what attributes and qualities signal trust more than others.

For example, you might find sincerity being something that above and beyond anything else is the most

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important thing for you to be able to trust someone. For me, it might be that you deliver when you say and that I can rely on you, you're reliable, and you follow through. If you're reliable and follow through, even if you're not a warm or compassionate person, that's less important to me than your reliability, so I might trust you because you're reliable. Someone else may care much less about reliability and care much more about do you care for the rest of us. I think the first thing is to find out – and it's not easy, there's no survey for this – but to really be mindful of what attributes and qualities are most important for each member of the team, and then to demonstrate those capabilities. I think that is the first step.

And then the second – and this often evolves in the life of a team – is to openly discuss in what areas norms are needed and to have very candid discussions. For example, if I'm a team leader and let's say we have set a ground rule for our meetings of no multi-tasking, and during every team meeting, we can all tell Joe is multi-tasking, we can hear the key clicks, he often says, what did you say, can you repeat that? If I as the team leader didn't call Joe on it or don't say anything and instead send a secret IM asking Joe to pay attention, then the rest of the team, as far as they're concerned, will assume either I was ignoring this bad and dysfunctional behavior, or that I'm playing favorites because I'm letting him go, or that I'm not serious about these group norms. In any event, their trust in me as a leader is going to be eroded if I appear either inattentive or apathetic about our ground rules. I think setting ground rules as a virtual team leader and saying, hey Joe, we need your participation; your views are critical. We can shorten this meeting by 10 minutes

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if we can all pay attention. So, Joe, can I ask you for the rest of the meeting if we can have your full attention? So it's making some intervention like that which is a little awkward for some people, but the rest of your team will hold you in much higher esteem.

I think it's the ability of the team and the team leader to set the stage that candor is critical and that if there's some behavior or there're some attributes or qualities that are going to be really important for everyone to be able to work together effectively, you have to be able to name it openly and discuss it as a team.

Joe: So as a leader, you still need to lead, virtually. I mean, even more so, you have to control that meeting.

Nancy: Yes, you do. I can't tell you how many virtual team leaders I can tell are multi-tasking as they're leading a team meeting. Nothing sends a message, like 'I don't care about you' than multi-tasking if you're the team leader. So the team leader has to really guide. I don't mean control, but I mean to guide the conversations thoughtfully. We talked before about the importance of having the agenda, knowing the intended outcomes, making sure everyone comes fully prepared, and having a level playing field as much as possible when they come to that virtual conversation. That virtual leader has to be mindful of are we staying focused, are we on track, am I hearing some emotion that's catching me by surprise? Why aren't people talking? I might have all these questions in the back of my mind as I am guiding the conversation and making sure we're on track and making sure we're going to accomplish what we set out to. That's a lot to do as one person.



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One piece of advice I often give to virtual leaders is to rotate that responsibility for either running the whole meeting, or maybe this month or maybe this quarter, Joe prepares the agendas; Sally is the timekeeper; John is the scribe, and Nancy, as the team leader, I'm not sitting back; I'm still paying attention, but I'm really allowing other people to take charge of some aspect of the meeting. And that does many things. One, it takes a big load off my plate. Another is if people have a job during the meeting, they are way more likely to be paying attention than if they think they can just be on cruise control. And another is it gives people a chance to shine. It gives people some visibility and maybe some extra challenges that can be a growth opportunity for many people. I mean; some people don't want that, but many people just love the chance to do something special, to show what they're capable of, because, in a virtual world, it's a lot harder as a team leader to think about career development of their folks. They don't know them well enough, and oftentimes; they're not their direct manager. So, they struggle to think about, well, what can I give Jeff to do or Mary to do that will give them a little stretch and a little opportunity in the spotlight? I may not know enough about them, so it's hard for me to figure that out. If you start with how can I rotate roles and elevate people within the context of our regular meetings, that's a big step.

Joe: What I think of when you say that – not that I'm encouraging performance evaluations or anything like that – but how are people recognized when they're members of virtual teams? How does that play out? Like, gee, Joe is a great virtual team player, is that

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being recognized within organizations now?

Nancy: I think very sporadically, and it depends on the culture of the organization. I think the whole topic of rewarding and recognizing great performance is so vital for virtual teams, because many times – and I think; it's true for many organizations – out of sight is perceived as out of mind. If I am far away from the mothership or the headquarters or the power base of an organization, I may feel that I can get skipped over for the next promotion. I won't be given the next plum project, because no one knows who I am. I'm here in my home office or in the satellite office; I'm doing a great job on this project, but who else knows? So, for the virtual team leader, it's important that they find ways recognizing both team and individual performance. The individual performance could be via performance reviews. If you're a project team leader, you often don't write the performance reviews. You often don't directly supervise the people who are on your team. You might or you might not, so you have to find ways making sure you can influence their performance review.

I'm really big on sending stuff. By stuff, I mean a card that I actually write out by hand instead of sending an email. It might be a coffee card to Starbucks or a box of chocolates. It could be a Thank-You card to the virtual team's family members saying; I know we've been putting him or her through the ringer and we so appreciate your support. But sending things really can mean a lot to a team member who otherwise might feel like no one really knows what I'm doing, or I think people don't understand that I've gone above and beyond. So I think the individual recognition is critical.

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It could also mean an email and copying their manager, or their manager's manager. It could mean getting something on the team portal or putting something on the web.

If we work together on the same campus, we might refer to Jeff Bezos' pizzas. We might have a pizza party to celebrate a huge milestone, or someone's birthday, or service anniversary with the company. With a virtual team, it's much harder but not impossible to celebrate. Some ways we can do that might be to actually send people a certificate to their favorite pizza place or coffee place. You also might send out mugs to everyone with the team logo or team color so that at the same time, everyone can hoist their favorite beverage at the same time and maybe use a video cam to show everyone. So, in a one-time zone, it might be tea and in another, it could be beer, but everyone is celebrating at the same time. I think the use of video can be very helpful, even if it's a pretty rudimentary method. It allows you to see each other's offices or locations while you're celebrating. And again, I think here you can send a congratulation card, or if you have the budget for it, it might be a basket of fruit, or just something that's meaningful that says, hey team, we did a great job.

Joe: One of the questions I want to ask you since I play in the sales and marketing world a little is how you do interact with customers on virtual teams? Can they be part of it? You're doing all these things, and there're certain mistakes you can make internally, but if a customer is part of the collaboration team with you, or you're collaborating with five people internally and five people externally, is there any dynamics or tips that

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you can give on that?

Nancy: I guess one tip I have is whatever virtual collaboration tool you typically use, whether it's ShareLive, SharePoint, or WebEx, whatever you use, make sure that everyone has equal access. So, if you're going to have a collaborative conversation where seeing a shared screen or giving everyone the ability to provide input electronically at the same time during a call, it's important that you have a level playing field. Choose technology and tools that people on the other side of the firewall can access, otherwise, they might tend to feel alienated. Likewise, setting up some kind of a portal or asynchronous online, anytime, way to have conversations, your collaboration team should have equal access, as well.

For example, many teams I work with use SharePoint as a vehicle by which they create a team portal, start conversations, access documents, et cetera. In some companies, people outside the firewall, people who don't carry a badge for that company, may not access SharePoint. In others, they give access to certain areas of Share Point. So make sure that whatever collaboration tools you're using are equally accessible. I think that's the main difference I see is that access to some of the tools that internal people may get and external may not.

The other advice I give – and I'm thinking back to project teams I was involved with years ago for some pharmaceuticals –, and that is make sure that what you're discussing, whether it's real-time or online asynchronously in some portal, make sure that it is not company confidential and that it is something that

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other people can see and contribute to. In the pharma world, there are many rules and guidelines about what you can't put in writing, even for a strictly internal meeting, ever. So, be very thoughtful about what conversation and what content is allowable and may be shared and may be discussed with certain partners, affiliates and clients.

And then another – and this goes back to principles and ground rules that you would have with your client team –, and that is what topics are permissible to be discussed. For example, if you're on a project team, and now I'm talking about you as the project team without the client in the virtual room right now, what kind of dirty linen do we launder? What can we talk about, and what do we really not want to talk about? For example, if we're really behind the 8-ball, we're slipping, we have some internal issues that we need to work out, how much do we want to reveal to the client, or not? Is this an okay conversation because we need them to trust us, or are there certain things that are sacred, and we may not talk about? So, I think setting those ground rules as the team will be critical. And then sharing those principles, let's say, with a client, so they understand that there are certain conversations that they will be involved with, and certain ones they won't. I think that's important to share.

Joe: I think you make a great point there, because the last thing you want to have in the middle of a conversation and in a meeting is someone saying, can we share this, and can we say this?

Nancy: Right, and then your client are going to say, whoa, I wonder what they're not saying, and oh, I guess they

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don't trust us.

Joe: Yeah, and right there the meeting just goes south, as I would call it.

Nancy: Yes. Absolutely.

Joe: Is there is a piece of advice that you would give to a team leader, let's say on a new virtual team, and what would that be?

Nancy: The most important thing you can do is work to establish credibility and trust, and realize that trust has to be earned. Understand what that takes in a virtual world.

I say this because even today, there are many managers who believe that the command and control style of management works. And so they don't feel it's that important they listen, or that everyone agrees on this or that. They think that if they're the manager, then people have to accept what they're saying. I think in a virtual world because you can't tell what they are thinking or feeling, and you have so few opportunities to find that out, it's important to avoid taking any missteps right off the bat, because once trust is broken or once your team members have reason to question whether or not you are a credible, trustful leader; it is extremely hard to make those reparations in a virtual world.

It is much better to put the time in upfront and actually have a plan, and I mean a written plan. It might be a matrix to think about who do I, as the team leaders, who are the most important I need to first build

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relationships with? How do I find out about their communication preferences and styles? How often do I need to have conversations with him or her? It really has to be pretty explicit. You almost need a trust road map of how am I going to build trust? What actions am I going to take? What behaviors am I going to demonstrate? I think if you can build trust for you and among the team, and even in little baby steps upfront, you're going to have a much stronger team. If you don't think that's important, if you gloss over that and instead stay focused only on going through your task list and you don't build the trust, it's going to be much, much harder to galvanize and mobilize that team over time.

Joe: Tell me just a little about your book. Where is it available? I assume Amazon and so forth, but tell me a little about your book, and also what will I get out of it? Will I get a checklist to build a team?

Nancy: The book, 'Leading Effective Virtual Teams', and the subtitle is 'Overcoming Time and Distance to Achieve Exceptional Results', is available on Amazon and through CRC Press. It's available both hardcopy and soft copy forms. What you'll get out of it, yes, it's a series of checklists. Over the years, I've written a monthly eZine called Communique, which is on my website. Over the years, I've probably written a series of well over 70 checklists related to particular topics related to virtual teams, virtual meetings, or leadership skills. I've created a lot of new content and built sections, and some of the new sections include: 'Sizing Up, Onboarding, and Mobilizing Your Virtual Team'. So how do you even know who is on the team? How do you know their preferences? How to do you get to know

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them? It's almost analogous to speed dating. You don't have those face-to-face opportunities to get to know the person, so how do you do that really quickly? Building trusting relationships across boundaries, communications planning, managing performance from afar, so for each of those broad topics, there're shorter topics, and then a whole series of tips that I have either written on my own or written with a lot of my collaborators and colleagues over the years.

Joe: So, there's actually like an interview process that you go through to get people on your team?

Nancy: Well, a lot of times, you don't have a choice. Whether you've inherited them, or you've handpicked them, it's important to find out pretty quickly how do they like to give information. Are they an introvert? Are they an extrovert? I will say parenthetically that, in this virtual world where we can't see each other, virtual leaders tend to value people who speak, and people who speak a lot. Well that cuts out up to half of team members if you accept the premise in Susan Cain's wonderful book, 'Quiet', that came out earlier this year that about half of us are introverts. So, when you're in a virtual world, it's important for you to understand am I working with introverts? Extroverts? Do people like to talk? Do they communicate in different ways? Will they communicate one-on-one more easily? Are they more comfortable writing something than saying something, et cetera? The faster I can find that out, the more effective I will be.

I'm a big fan of using certain online tools like Myers-Briggs, or DiSC. There are a number of similar tools that people use to quickly find out where people are



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coming from in terms of their dispositions and communication styles, and I like to share that across the team, assuming I have everyone's permission to share that information. And almost always, I do. So, you have to find ways jump starting that personal knowledge in a virtual world. It can take a long time to figure that out without that kind of a tool.

Joe: Do you have some speaking engagements or different webinars? Could you tell me a little about some of the services you offer?

Nancy: Sure. I have a couple of different radio shows coming up, one on Voice of America on January 30 with Bob Whipple, a colleague of mine, on the topic of trust. I have a couple more scheduled; I can't think of the dates fast enough. On my website, if you sign up for Communique, it's a free series of tips each month, and I always have the news about speaking engagements and so forth. I run a virtual leadership series for clients on an ongoing basis. It's usually a three-module workshop that I design specifically for particular client groups. I run them all the time for people around the world, day and night. Basically, it helps virtual team leaders and virtual team members to be more effective and give them some tools they need. It includes a reference guide, quick tips, and job aids. I deliver them pretty consistently. And then I have another series on planning and running engaging virtual meeting that, likewise, is a multi-part series. I always customize these sessions for clients because I think people get a lot more out of it if they can apply it to their real world versus some generic course. I have lots of them coming up in the next couple of months, just to start.

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Joe: What is your website?

Nancy: [www.guidedinsights.com](http://www.guidedinsights.com)

Joe: Is that the best way to contact you through the website?

Nancy: Probably, or [Nancy@guidedinsights.com](mailto:Nancy@guidedinsights.com). Because I work with a lot of global teams, I'm often up at very crazy hours leading some of these workshops, so I'm usually pretty responsive.

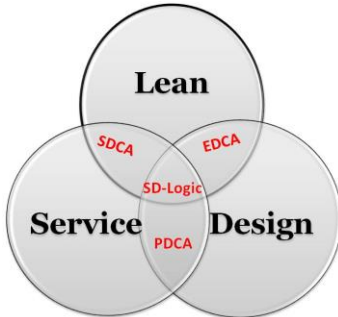
Joe: I would like thank you very much, Nancy. I appreciate it. I think we had a wonderful conversation. I could go on for an hour talking to you about virtual teams, but I have to end it somewhere. This podcast will be available in the Business901 iTunes store and the Business901 website. So, thanks again.

Nancy: Thank you, Joe. It was a pleasure.

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Podcast Transcription

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Joe Dager is president of Business901, a firm specializing in bringing the continuous improvement process to the sales and marketing arena. He takes his process thinking of over thirty years in marketing within a wide variety of industries and applies it through Lean Marketing and Lean Service Design.

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