



Unify New Way to Work Index

The Habits of Successful Virtual Teams

Survey Analysis

In January 2014, Unify continued our quest to crack the code on virtual teams by studying the habits of teams of all sorts. We wanted to compare the habits of teams that were all in one place to those with members in multiple locations (virtual teams); and we wanted to understand the effect of dispersed teams on success - or the struggle to achieve it. The resulting survey has proved to be one of the most interesting points in our journey to master the challenges of today's business teams.

In short, those on highly successful teams engage more often on a personal level; speak their mind and contribute freely regardless of their location.

Surprisingly, being a virtual team is not a defining factor to team success. Rather, some teams adapt to it. Some don't. In fact, the more successful teams in our study tended to have slightly more of their members in various locations than teams with tepid or dissatisfying outcomes. Just 6% of all those responding to the survey work on teams where all members are in the same location. Among those describing their teams as very successful, 4% were all in the same place. Among the less successful teams, 5% had all their team members in one place. No matter how we sliced the data, team distribution simply wasn't a significant factor of success.

What differentiates more successful teams from those that report lackluster outcomes is not where their members are but how they engage with each one another - specifically, the frequency and candor with which team members talk.

In short, those on highly successful teams engage more often on a personal level; speak their mind and contribute freely regardless of their location; and are more likely to be in meetings ripe with engaging dialog, rather than one-way monolog that may or may not be relevant to all team members.

Here, in a nutshell, is the difference between those that rated their teams as very successful and those who described their team's success as marginal or worse:

- **Those on very successful teams are more personable in their habits.**
71% of them engage in personal/non-business conversation with colleagues daily or weekly, compared to just 42% of those on less successful teams. A stunning 38% of those on less successful teams say they rarely or never have personal conversations with virtual team members, either as part of a scheduled meeting or as an ad hoc call. Successful teams carried on with this habit regardless of how many team members were remote. Less successful teams show a drop-off in personal engagement that correlates with the proportion of members working "elsewhere". (see more below)
- **Successful team members reach out across locations.**
86% of those on the most successful teams regularly reach out to colleagues at other sites merely to keep in touch. On less successful teams, nearly half (44%) rarely or never do so.

- **Dialog trumps monolog in successful team meetings.**
77% of those on highly successful teams say less than a quarter of their meetings are one-way monolog. Only 16% of those on less successful teams can make the same claim. In fact, 39% of those on less successful teams say that more than half of their meetings are primarily or completely one-way monolog, rather than a collaborative exchange of ideas and information.
- **Successful teams have more focused meetings.**
Just over half (51%) of those on very successful teams say they rarely or never find themselves on calls where most of the content is irrelevant to their work. Only 22% of those on less successful teams say the same.
- **Successful teams collaborate freely wherever they are.**
Only 16% of those on the most successful teams say they are less likely to voice disagreement on virtual calls than they would in face-to-face

meetings; compared to 55% of those on less successful teams. Only 20% are less likely to share a spontaneous (half-baked) idea on a virtual call than they might in person, compared to 59% of those on less successful teams. The proportion of remote team members had no significant effect on this finding for either more or less successful teams.

- **Successful teams don't let distance get in the way.**
68% of those on very successful teams have more than half their members in another location. 85% have over one-fourth of their members working remotely. Yet, virtual membership is not a clear factor to success. Among less successful teams 55% have more than half their members working in various locations, and 75% have more than a quarter of their members "elsewhere". The behaviors of team members clearly trump the location of team members.

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Is Perception the Reality?

For example, those who take the time for a bit of personal conversation on a regular basis are more likely to be part of successful teams.

Virtual teams are the de facto work experience today. Only 6% of those responding to the survey work on teams with no virtual members. Yet, we often hear people tell us that they don't see virtual teams as very prominent in their country, function or company. When challenged, however, most will tell us that they do, in fact, work with people in other locations or with colleagues or managers who have a local office but are away as often as not.

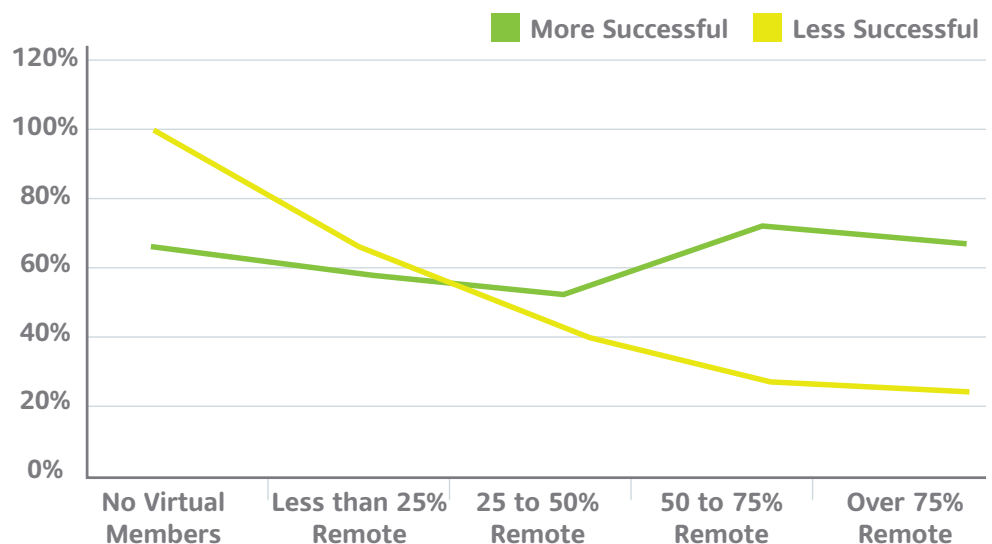
The difference: Those on the road or working in remote locations know they are on virtual teams. Those in the office sometimes view remote or mobile members as outliers to a co-located team. In other words, they may not identify as being part of a virtual team because they and many of their colleagues are co-located.

This begs the question: Is virtual team success affected by awareness - or lack thereof -- that we need a new way to work? Is the problem that some teams are slow to realize that their team - and the manner of staying engaged with that team - has changed?

In several instances, the survey results show a tendency for all teams to see a slight decrease in team member engagement when only a small proportion of team members worked remotely. As the proportion of remote members grows, the more successful teams seem to recover a higher rate of engagement behaviors.

For example, those who take the time for a bit of personal conversation on a regular basis are more likely to be part of successful teams - whether it's a call to catch up or a quick check-in at the beginning of a scheduled conference call. The frequency of personal conversations is the most profound differentiator of successful and struggling teams. The data seems to suggest that this habit is a matter of team culture first and foremost. While the most successful teams consistently showed 60% to 70% of members engaging in personal conversation with colleagues daily or weekly, the less successful teams engaged less and less as the proportion of remote members increased.

Engages in personal (non-business) conversation daily or weekly



In this case, as well as with other behaviors that ally team success, more successful teams seem to take action to stay connected and protect the conditions that lead to candid dialog as their proportion of remote members increase.

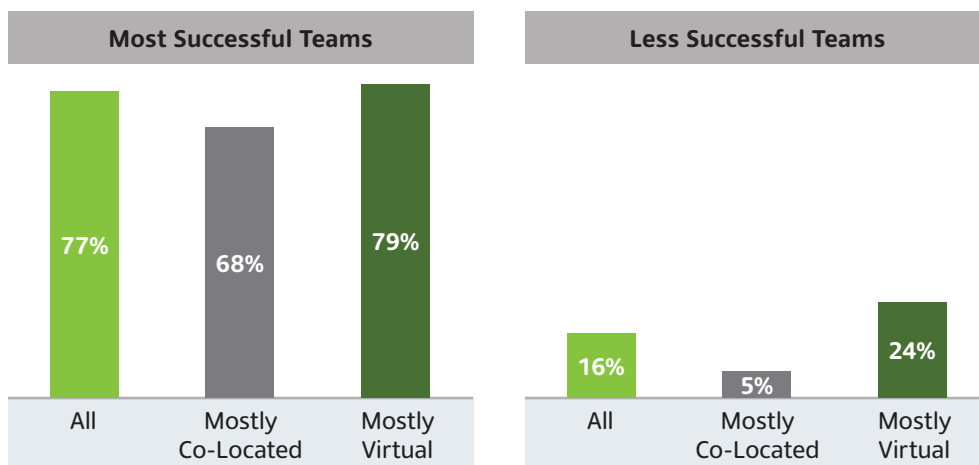
It's as though successful teams rally to the realization that they need to adjust their behavior to stay engaged when their team membership is more broadly dispersed. Less successful teams seem not to take compensatory measures in their teaming behaviors, or at least to take them as quickly or frequently as those on more successful teams.

Though not conclusive, there are some hints in the data that some teams come to a tipping point where their behaviors change to adapt to more virtual team members - a factor we'll study more in a future survey. Even on less successful teams, those with the majority of their members in different locations show some signs of improvement in engaging behaviors, compared to struggling teams with more members co-located.

For example, one measure of collaboration we considered was the proportion of virtual team meetings that are primarily one-way monolog, versus collaborative discussion. Among those on very successful teams, 77% say that less than a quarter of their meetings are mostly monolog. While less successful teams, in general, showed a dramatic difference (only 16% claimed such a limited amount of monolog) those struggling teams with the majority of their members working remotely fared slightly better (24% met the benchmark) than struggling teams that had a majority of workers co-located (only 5% met the benchmark).

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Collaboration Benchmark: Less than one-fourth of team meetings are mostly monolog



When the majority of team members are remote, all teams show a pick-up in key engagement behaviors to some level. Is it a fluke, or the beginning of a new way to work?

In other words, make sure the whole team feels like a team, rather than allowing a perception that those not in the office are outliers.

It may be worthwhile to keep watch on the behavior of teams with less than half of their members working on the road or in other locations. Team leaders can easily set a good example for all team members:

- Initiate quick personal conversations at the start of team calls (“How was your trip?”)
- Keep conference calls small enough to support dialog (handle one-to-one items offline)
- Call on remote members by name to contribute on calls
- Encourage the office-based contingent of the team to stay engaged with remote workers by assigning shared tasks with shared responsibility for the outcome
- Avoid the tendency to hold off on discussions until a conference call can be scheduled, instead encouraging people to pick up the phone as needed to exchange ideas and information. (The most successful teams do only about a quarter (27%) of their collaboration in scheduled meetings.)

In other words, make sure the whole team feels like a team, rather than allowing a perception that those not in the office are outliers. In the final analysis, no matter where you are, if your colleagues aren't in the same place, you're on a virtual team. The sooner your team starts to act like a virtual team, the greater your chances of success.

Personality or Skill?

Is success in virtual teams a matter of skill, personality, leadership, team culture or something else? While there is much conjecture on this, perhaps the best way to find an answer is simply to challenge yourself and your teams to be aware of the habits of successful team members. Lead by example, and be forthcoming in setting expectations for how members of the team should work together.

In our conversations with virtual team leaders and members over the last year, we are constantly struck by the impact a determined change in behavior can have. A virtual coffee break with a new colleague or contractor that's struggling to click-in to a highly mobile team can open the door to invaluable information on culture, personalities, how to do things, candid feedback – and permission to call on someone for a little off-the-record advice. Simply addressing each person by name as they come onto a conference call and getting more than “hi” from them can dramatically change the tone of the call and discourage people from dialing in, hitting their Mute key and mentally checking out. Learning to respond to anxious emails by calling the writer can dramatically change someone's day and the relationships on the team. Getting the team to use IM for quick questions, requests for help, or even a virtual cry of angst can quickly unravel the feelings of so many virtual team members that they're out there on their own.

Here are some simple things that can change the way your team works with little effort, no expense and only one small moment of courage and discipline:

1. Take an interest in your colleagues.

Ask how they are and what they are up to. Let them know it's nice to cross paths with them again. Taking two or three minutes at the start of a conference call to chat will change the nature of the meeting to more of a

discussion. You'll get better input and the team will be energized. Stuck with email? Add “How are you?” as the last thing in your note. It's more likely to be answered and creates a chance to engage a bit more personally. By the way, this isn't a time for whining. Show you're interested in your colleagues. Daily or weekly personal conversation is the signature of successful virtual teams.

2. If your teams calls are too big for a few minutes of chat, change your calls:

• Know the difference between a discussion and a briefing.

If you need to deliver a lot of information to a lot of people, consider writing or recording the briefing info for team members to consume on their own time. Record a narration to your Powerpoint presentation. Record the slides and talk track in your online conferencing tool. Write a bulleted brief. Use a tool like Brainshark or Camtasia to record screens and narration. Then schedule a shorter call for discussion and decision-making, and don't repeat the briefing. Expect the fair exchange –members get a shorter meeting and more schedule flexibility, but they are expected to get through the briefing before the discussion meeting. You'll speed up the exchange of information, and it will be easier to find a shorter timeslot for a discussion meeting than a long timeslot for a briefing. If more than

Record a narration to your Powerpoint presentation.

Record the slides and talk track in your online conferencing tool.

You'll learn from each other, challenge each other, support each other. That's where the magic of teams happens.

a quarter of your meetings are mostly monolog, reassess your communications and collaboration strategy.

- **If you need a discussion, keep the group small.**

Meet with advisors separately and assign someone to be their ambassador, rather than having them on the team call. If your team has separate task groups, meet separately, then have representatives from each come together as needed. If you can limit your calls to no more than five or six people, you'll get real dialog.

- **Don't schedule a group call when you need one-to-one briefings.**

Managers and team leaders should meet their key players one-to-one for status updates that don't affect other members of the team. Use team meetings to address team projects, goals and outcomes. If much of your team meeting is irrelevant to some members, you're encouraging people to tune out.

- **3. Don't try to do everything in scheduled meetings.**

Successful teams do about a quarter of their collaboration in scheduled meetings. The rest happens more spontaneously and in smaller groups. Use your Presence display or IM to ask colleagues for a minute to discuss an idea or problem. Then dial the phone and talk. It's how we work together in an office. There's no reason not to do it on virtual teams.

- **4. Schedule virtual coffee breaks.**

This is a not a luxury item. This is where engagement begins. If your team members were all in the office, you'd chat when you come in first thing in the morning, or over lunch, or at the water cooler. In the office, no one considers a bit of personal of chat to be a waste of time - in fact, we'd be concerned about someone who didn't engage with others at work. The rules are no different for virtual teams. It's a critical discipline for today's workers - those in remote locations, as well as those in the office with colleagues elsewhere. One-to-one. No agenda. Schedule 15 minutes - though chances are you'll talk longer, and you'll talk about the business. You'll learn from each other, challenge each other, support each other. That's where the magic of teams happens. Have a scheduled virtual coffee break with someone important to your success at least once a week. Make it a habit to IM remote colleagues when you're stepping away for a quick cup of coffee or to have your lunch to see if anyone is free to jump on the phone and do the same.

About the Survey

The survey was conducted in January and February 2014. The survey was distributed by email, social media and website by Unify and our partners at the Ferrazzi Greenlight Research Institute. No compensation was offered for responses, other than a copy of this report.

Sample size was 326

The population included 56% from the United States, 12% from Germany, 8% from the United Kingdom, and lesser representation from a total of 26 countries.

Job Function Breakout:	
IT	24%
Sales or Service	24%
Marketing	11%
Product/Engineering	12%
Finance/Admin	4%
Other:	25%

Job Rank Breakout:	
C-Level	9%
VP	8%
Director	18%
Manager	24%
Team Leader	9%
Team Member	27%
Other:	5%

Respondent Age Group Breakout:	
Under 25	1%
26 to 35	9%
35 to 4	28%
46 to 55	40%
Over 55	22%

Sector Breakout:	
Healthcare	10%
Finance	8%
Public Sector	4%
Education	4%
Technology	43%
Energy / Utilities	2%
Construction	2%
Retail	3%
Hospitality	2%
Transportation	1%
Manufacturing	7%

As the survey related to virtual teams, it's possible that the findings represent a disproportionate number of people who work on or closely with virtual teams. Team success was subjectively represented by the responders as Very Successful, Reasonably Successful, So-so, Not Very Successful, Not at All Successful. The data was analyzed by response group as well as differentiating the "more successful" (Very or Reasonably Successful) from the "less successful" (so-so, not very, not at all successful) cohorts. Best practices focused on those who identified their teams as Very Successful, compared to those in the "less successful" cohort.

Additional outcomes from this survey will be published separately.

A copy of the survey can be found here in English or German: <http://www.unify.com/us/new-way-to-work/inside-virtual-teams-survey.aspx>

About Unify

Unify is one of the world's leading communications software and services firms, providing integrated communications solutions for approximately 75 percent of the Fortune Global 500. Our solutions unify multiple networks, devices and applications into one easy-to-use platform that allows teams to engage in rich and meaningful conversations. The result is a transformation of how the enterprise communicates and collaborates that amplifies collective effort, energizes the business, and enhances business performance. Unify has a strong heritage of product reliability, innovation, open standards and security.

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