



A New Way to Work

Thought Leadership Series
Part 2: Rules of Engagement for a Virtual World

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Rules Of Engagement In A Virtual World

In this second paper in our New Way to Work series, Keith Ferrazzi, author and founder of the Ferrazzi Greenlight Research Institute, delves into a wealth of research on virtual teams in an effort to prescribe guideposts for setting up, managing and engaging virtual teams. We start with a look at selecting the right people for virtual teams and virtual work; understanding the impact of team size; and considering the use of advisors rather than team members to keep teams sleek yet well informed. You'll learn about the optimal styles of communication for virtual teams. We'll even dig into some interesting neuroscience and the creation and maintenance of team ties built on trust.

Introduction

The trend to virtual teams continues unabated. Clearly, we have our work cut out for us to make sure we're as effective collaborating remotely as we are face-to-face.

The notion of virtual teams applies as an overarching organizing principle as well. Leaders that used to manage a hierarchy, then a matrix, are now managing relationships with a network of individuals they may never have met inside and outside our organizations. That broad virtual engagement makes sense. 87% of respondents to our 2013 Greenlight Research Institute study on team effectiveness agree that relationships with their informal network has greater impact on achieving goals than people from within their formal reporting structure.

In our first white paper, "Characteristics of a Highly Engaged Enterprise", we described the essential qualities of engagement - measure engagement, implement more engaging communications, and follow the rules of engagement in an increasingly virtual world. Now it makes sense to explore in more detail how the best of leaders are following the rules to score higher engagement and correspondingly better business results. Technologies that help our virtual teams become more productive, successful, and innovative are an important aspect of it. They've existed for years under labels like "Unified Communications" and "Collaboration" and internal social network platforms. But the Greenlight Research Institute study found the impact of today's tools to be decidedly mixed.

More than 80 percent of respondents felt virtual communications technology improves employees' sense of engagement. Yet more than half said constant connection to all streams of information distracted more than it contributed to their job satisfaction and productivity.

In this paper, we'll examine practices that leverage the full value of engagement solutions within virtual teams. Melanie Turek, Vice President, Research at Frost & Sullivan, is one of many voices saying organizations achieve clear competitive advantage deploying blended communication/collaboration technology in advance of their competition. We'll look at a number of case studies that bear this out.

As part of Greenlight Research's focus on cracking the code of human behavior, we'll also offer some useful rules related to leveraging engagement tools. They ease the orchestration of high definition audio/video with a simple user interface that allows users to engage each other almost as naturally as if they were in the same room, which eases enterprise - and business network-wide adoption. And we'll even look at how you can leverage neurochemistry to positively impact engagement for your virtual team.

We hope you find this informative and useful in advancing the success of your teams.

Master Virtual Team Makeup for Business Advantage

Getting team composition right is critical to a team's success.

Setting up small, agile, high-performing virtual teams has enormous potential for companies to increase sales, penetrate new markets, improve business processes, and come up with the next generation of disruptive innovations. But putting together a great team is tricky.

OnPoint Consulting's 2008 study found that more than 25 percent of teams were not performing up to par within many companies with significant investments in technology for virtual teamsⁱ. A KPMG study of outsourced IT found that 86 percent of companies lost more than 25 percent of IT benefits because of virtual team projects that had to be shelved or sharply downsizedⁱⁱ. And a study of 120 virtual teams by Richard Hackman of Harvard found that fewer than 10% of team members could even agree on who was on each team.

Part of the problem is that teams - both the virtual and collocated types - are often thrown together without much thought or planning.

Booting an earnings boost

At a large, multinational manufacturing company with which Ferrazzi Greenlight recently worked, a team was formed to deal with some of the company's complex, interdependent businesses. The goal was to optimize decision-making all along the value chain. The executive leadership realized that bringing such a team together had the potential to boost earnings by tens of millions of dollars.

But when we looked under the covers at the hastily assembled team, it was clear that not enough thought had gone into selecting the members. The team was huge - more than 30 people - with a mixture of business, manufacturing, and commercial leaders, some of whom reported to each other. While some members had deep knowledge of certain parts of the business vital for optimization decisions, others were included on an honorary basis. By the time we were asked to help get the team on track, members openly acknowledged that the team was in disarray and that the optimization decisions it had made had fallen short of increased earnings projections.

As the manufacturer discovered, getting team composition right is critical to a team's success. That's especially true for virtual teams, which are more autonomous than collocated teams. Leaders of virtual teams must work harder to develop trust and rapport because such teams don't always avail themselves of the benefit of frequent informal exchanges and seeing visual and body language cues - vital feedback mechanisms that help keep team members' efforts aligned.

The manufacturing company is not alone. I rarely see virtual teams that were formed with sufficient forethought. In many companies, teams just seem to happen - coming together out of nowhere, grabbing any available resource, completely unplanned. Months or even years later, senior executives have to face

the unpalatable truth: the virtual team that was put together to slash costs is not only dysfunctional, it was a drain on the bottom line.

That same OnPoint Consulting survey of 48 virtual teams across a wide range of industries to understand what makes a high-performing team successfulⁱⁱⁱ found that decisions about team composition – the size and structure of the team as well as the skills members bring to the team, including interpersonal skills – are among the most important predictors of virtual team success.

Small is beautiful

In my experience working with everything from iconic multinational companies to tiny startups, the best virtual team is a small one – under 10 people. Four or five members total is ideal. OnPoint's research supports me, noting that 37% of low-performing virtual teams had 13 members or more.

Here's why small is better: relatively minor coordination and communication challenges grow almost exponentially as a virtual team grows. Do the interpersonal math: Inevitably, someone (or a subgroup) feels left out of the loop. Few things erode trust faster than being left out of important communications about a project with which you are involved. Yet even the most diligent manager would have difficulty keeping up with the communication needs of a large, geographically dispersed team.

Where input from a wide range of people with expertise in different areas is needed, there's a strong temptation to put together a virtual team that's too large. OnPoint found that opting instead to keep the core team small while advisory groups gave input on an as-needed basis was more likely to be successful. This is the strategy I recommend to clients as well – one that the manufacturer

I described above adopted after months of poor coordination and regular communication snafus.

Don't make the mistake of including honorary team members. And team membership shouldn't be voluntary or outside the normal job. It is the job.

In my experience, teams with a lot of members who have no real stake in the team's success almost invariably fail.

Getting the structure right

Although I believe it is often beneficial for teams to be cross-functional, OnPoint's study found that was not the case. When virtual teams come together from a range of functions – say, finance, operations, HR, and IT – to work on a cost-management initiative, problems resulting from a lack of accountability tend to arise. The reason is that leaders may not have formal authority over every member of such a matrixed team, making it more difficult for them to hold others accountable.

I see this a lot, especially in large firms. Virtual team members are frequently not evaluated on their contributions to the team or on successful collaboration, but rather on their performance within the line of business they represent. This sets up an automatic disincentive to collaborate and has the potential to derail important and innovative virtual team initiatives.

That said, although OnPoint's study notes the potential for accountability problems and recommends avoiding cross-functional teams, it's not an inevitable outcome. I've written earlier about the importance of a culture of accountability in any successful virtual team. The important takeaway is that leaders who are putting together cross-functional virtual teams need to ensure that clear lines of accountability and uniform performance measures are established at the outset.

Virtual team workers need to be more resilient than the average employee... but they have the same need to feel a sense of purpose in the work they do.

Virtual work isn't for everyone

Red Giant, a company that develops video special-effects software, has gone from being two guys with an idea 10 years ago to a leader in its field by adopting a "there is no plan B" credo. They define the goals for each project, put together small virtual teams and - here's the big one - give them the responsibility for the success of the project. Each team member shares a piece of that responsibility.

"There is no Plan B," says Micah Sharp, general manager of Red Giant. "It's us."

Despite the company's rapid growth, it doesn't make team staffing decisions quickly. "We like to date a lot first," says Sharp, of the 50-person company, 36 of whom work virtually. Micah recognizes that not everybody is suited to virtual work. He says it takes a combination of entrepreneurial spirit and initiative as well as technical skills to thrive as a remote worker.

The virtual skill set

OnPoint's research with more than 400 virtual workers confirms that successful virtual employees need a somewhat different skill set than their collocated counterparts. Their study shows that successful virtual team members tend to be more self-directed and able to solve problems on their own than collocated counterparts who can more easily turn to others and may develop a habit of relying on outside help. Virtual team members also tolerate ambiguity better than other employees - everything from that terse email from the boss that might be taken negatively by other staffers to not knowing important details about a project as quickly as collocated workers do.

One of the most important attributes virtual workers need is excellent communication skills. Not only do they have to express themselves well, but

updating others and sharing project documents has to happen automatically and without fail. Distance and time lags are an inevitable downside of working remotely. Virtual employees need to be hyper-vigilant about communicating with everyone else on the team. There's no room for personality conflicts or information hoarding.

At the end of the day, virtual team workers need to be more resilient than the average employee - able to stay focused and work on their own, and able to deal with greater and more frequent communication gaps and lags. But they have the same need as other employees to feel a sense of purpose in the work they do, and to feel connected to others within the organization. Interestingly, Gallup says a strong predictor of an employee's productivity is whether they have a best friend at work^{iv}. Carefully chosen, small teams of self-directed people are the keys to creating high-performing virtual teams.

Human relationships make or break virtual teams

One of the biggest mistakes I see business leaders make is thinking all they need for great collaboration is great collaboration technology.

Tools designed to help us more easily and clearly see and hear and text each other while automatically serving up information based on the context of the meeting are a great supplement to leadership skills. Yet it's the soft skills - which nurture the human connections leaders must establish - that ultimately make collaboration successful.

As table stakes, you absolutely must get your mobile, distributed, virtual work force onto new technology that helps rather than hinders. What do I mean by hinder? In a recent Unify survey of knowledge workers:

- 79 percent of respondents reported working always or frequently in virtual teams.
- Only 44 percent found virtual communication as productive as face-to-face communication.
- The vast majority connected via email, phone and conference calls
- Even though 72 percent said video would make teamwork easier, only 34 percent actually used video
- 43 percent admitted feeling confused and overwhelmed by the mishmash of collaboration technology at their disposal^v.

I'm seeing a new generation of technology emerge that can make dispersed teams more productive than collocated teams. Forrester Research's Henry Dewing says some enlightened users of the latest tech actually prefer to meet in their video- and web-conferencing platforms over a physical conference room, and use online and virtual tools even when meeting in person. Sharing to improve information and functionality are an integral part of a productive conversation.

To make virtual teamwork work this well, you'll likely need to move your team to a new set of behaviors, not just to a new generation of technology. Human engagement is the first priority. Indeed, one of the "old way" to "new way" behavior changes requires the team to trust team leadership enough to give up their familiar process - calendared conference calls and manual orchestration via email of everything shared and decided - for an approach assisted by emerging technology.

The behavior gaps that keep virtual teams from reaching their goals can be closed by adopting three key practices:

- Setting ground rules for managing virtual communications
- Aligning personal and professional goals

- Strengthening relationships to enable the candor required for true collaboration.

Ground rules

Do a personal and professional check-in:

While it's common for employees who are collocated to chat about what's going on in their lives, sharing a recent success at work or a personal story before a meeting begins, it's much less common among virtual teams. They often spend their days in conference calls, where muting and multitasking are the norm before - and even during - a meeting.

However, this efficiency-driven approach to team collaboration overlooks something important: Humans are intensely social beings. They need to feel connected. Personal sharing is one of the easiest and most overlooked ways to create that connection, especially when staff members work at a distance from each other.

A personal/professional check-in at the beginning of meetings makes people feel part of a team. It's probably the easiest way to overcome the isolation that can creep in when people don't work together physically.

Don't allow multitasking:

Research shows that multitasking during conference calls is extremely common. In some studies, as high as 90 percent of people acknowledge they do other things during these calls, from a wide range of places, including the kitchen, the pool, and yes, the bathroom.

Regardless of when and from where you join a team meeting, I can't emphasize enough how important it is for collaboration that everyone be mentally present and engaged during meetings, not working on another project or checking email. As a manager, if you set that as an

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expectation from the outset – and call on people often to share their thoughts – chances are good that they will.

I’ve started calling out people who are multitasking when they should be participating and assign small, usually humorous penalties to offenders such as putting one thin tenth of a bitcoin in the virtual team party fund.

Minimize mute whenever practical:

Besides encouraging general disengagement, the dead air of mute kills any attempt at humor and eliminates the bonding value of shared laughter. But I’m the first to admit that it’s not always practical. Anyone who has seen me stretch my day by taking calls when I’m going through the airport (with a TSA-enforced mute at the security checkpoint and elsewhere by overhead announcements) knows muting is sometimes a good idea. Likewise in a large briefing, although here I would argue that a teleconference is a less effective way to brief a team than requiring some reading with a question and answer follow-up.

I was swapping stories with Henry Dewing of Forrester the other day about how people frequently try to cover the fact that they are multitasking with, “Can you repeat that? I was on mute.” As Henry pointed out, “If you were on mute, it doesn’t mean you can’t hear me. It means I can’t hear you.” Touche’.

Getting alignment

Melding personal and professional goals:

Much as some business leaders would like to believe that people are motivated exclusively by the business’ long-range objectives and will selflessly devote their full energies to a project because that’s what is best for the company, it’s just not so.

When a leader shares her own emotional stake in a project’s success as well as the business goals the team is trying to achieve, she sends a powerful message to the team that pursuing your own personal goals in alignment with the business goal is what it’s all about. The more closely a leader can tap into and align her staff’s personal goals with business goals, the more committed and engaged her people will be.

Making work more joyful by full engagement with the virtual project team should be one of the shared goals.

Striking the personal/professional life balance:

Henry also spoke to me about personal/professional life balance. He said people are slowly becoming more comfortable talking about the new work/life blend that comes with working remotely. “When you’re on a large conference call and a baby cries or a dog barks or a doorbell rings, people don’t make comments quite as much anymore.”

I’d go further than that. I’d recommend you focus for a moment on the bark, the cry, the ring. Acknowledge that person’s life and surroundings. Use it as a reason to engage that goes beyond the initial “personal/professional check-in.” Sharing about Spike the dog helps people bond, relax and trust each other.

I know a very successful CEO who runs his company remotely – and readily admits he wears pajamas most of the morning. What matters is that his direct reports know he’s driven by results. He doesn’t fall into the old (and unreliable) way of measuring productivity: assuming that work is getting done because employees spend long hours in the office. The new work/life balance means that you do what you need to do at the time that’s most convenient. If that means taking your kid to the dentist at noon – or making a call to Singapore at midnight – so be it.

Creating candor

We've all been in meetings where the real conversation only starts after the meeting ends. But shame on you if you're one of those managers who's created a climate where employees don't feel they can speak their minds - choking back their opinions and stifling the sort of healthy discussion and disagreement that make meetings useful and productive.

While it's important to embed as much relationship building and trust creation into a team's process as possible, the rubber really meets the road on candor when teams face tough decisions that no one person has the best solution for - where input from various constituencies is critical to getting it right.

Achieving candor is hard enough for collocated teams. It's all the more challenging in a virtual environment. But make no mistake: candor is the #1 indicator of team productivity.

Here are some devices I routinely use to keep the conversation candid in our meetings at Ferrazzi Greenlight.

- **Appoint someone to be the team's "Yoda":** Add a bit of levity to meetings by turning to the Yoda of the day at critical points during the meeting and ask, "So, what's going on here that nobody's talking about?"
- **Reward naysayers:** Give warm, generous praise to team members who aren't afraid to speak their minds when everyone else appears to be in agreement on an issue. And don't let it drop there. Poll the room to see if others also have different views but are afraid to speak up.
- **Leverage confidentiality:** During the transition to candor, it can be helpful to ask team members to share thoughts anonymously. The right-shared space collaboration tool helps. The

facilitator can forward the responses right away - or start the next meeting by focusing on one or two that best captured the team's concerns. Keep in mind that employees who are used to unresponsive managers will be watching closely to make sure the facilitator doesn't subtly dismiss issues or try to minimize their importance. Be prepared to play a neutral role as facilitator so that other voices can be heard.

Behavior going way back - and the technology change ahead

70 thousand years ago, when we were born as a human species, if we weren't part of a tribe we were eaten by something. The need for tribal belonging is a core component of who we are. Trust me: No team will achieve greatness as individuals working independently. We need to get people to let their guard down, to be more vulnerable and thus to be open to connection with their virtual tribe, which translates into, "Because I like you, I want to help you." That starts true synergy. "I'm willing to make small compromises for you." Not for some greater good but for you. And with greater openness to each other's point of view, we can bounce ideas off each other candidly and get some real innovation going.

Technology has too often been disruptive. It sets us on edge and discourages us from coming together as a tribe. But it turns out a number of new technologies on the horizon keep the noise of over-connection down. I'm seeing tools leverage the relationships and discussion threads captured in team/client/mentor interactions over time to foster very human connections. Tech will help the baby crying become our team's kid crying.

Candor is the #1 indicator of team productivity.

Kick-Starting A Virtual Team And Keeping The Momentum Going

Creating a culture of generosity within a company – one in which employees routinely help each other by coaching, teaching, and consulting with each other – was among the strongest predictors of group effectiveness.

The pace of change constantly accelerates in the business world. Whether you're a virtual team leader or team member, there's no honeymoon period anymore. The pressure to be productive nearly from Day 1 - which, by the way, is almost as likely to take place at your firm's offices in Mumbai as it is at headquarters - is enormous.

We can certainly do a better job of on-boarding people to teams, which is naturally made more difficult when teams are not collocated. Just one of many indicators of this is the Corporate Leadership Council's astounding statistic that 50 percent of recently hired executives quit or are fired within the first three years of employment^{vi}. That has huge cost implications. Yet most companies don't invest nearly enough time and energy in ensuring that new hires or recently chartered teams are fully up to speed. Too often, on-boarding plans consist of a dozen or more documents that team members are supposed to read and digest while in the air on the way to their first assignments.

What's missing at so many companies with whom I work is the time for virtual team members to learn from and form relationships with the people who are most important to doing their job successfully, many of whom may be located hundreds or even thousands of miles away.

Think about it: No one should have to make sense of an organization in a vacuum. As a Harvard research team led by J. Richard Hackman found^{vii}, seemingly disconnected threads of information begin to form patterns that make sense only when people have an opportunity to interact with others who can help them to contextualize the information. In addition, Hackman's team found that creating a culture of generosity within a company - one in which employees routinely help each other by coaching, teaching, and consulting with each other - was among the strongest predictors of group effectiveness.

Getting off to a flying start

I recommend that clients shorten the learning curve and create a culture of generosity by helping every new hire put together a Relationship Action Plan (RAP) in their first weeks. In it, list the 10-15 internal people who are most important to doing their job well and direct your new team member to purposefully go about building a relationship with each one. Overwhelmingly, those who create a RAP report that it was the most useful thing they ever did in their first weeks on a project team or job.

My friend Ritesh Idnani, CEO of ISGN, a global mortgage services company whose entire 11-person executive management team works remotely, puts it this way:

“You need to get people off to a flying start.” Ritesh gives each new executive two weeks to talk to each person identified in the plan as “important to know,” interviewing them about all aspects of the company and the job. Then he checks up, and finds the full-bandwidth effort over the new hire’s first weeks pays off handsomely.

“At the end of two weeks I ask the person to sit down with me and tell me what she learned – her observations,” says Idnani. Not only do they have a new connection into the team: you renew yours. “You end up learning a lot from someone coming from the outside with a fresh pair of eyes.”

Planning a great team kick-off event

Just as individual team members need to build relationships to be effective in their jobs, newly-formed teams also require more than a project plan and set of work streams to be high-performing.

Yet so often I see managers launch a team with a de-motivating statement of the challenges the company faces coupled with a driving sense of urgency – the proverbial burning platform. This may work once or twice, but employees quickly tire of working 24/7 to put out the flames.

The key to kick-starting a team is not to galvanize people into action through fear, but to tap into each team member’s personal purpose and ignite their desire to achieve both their own goals and the company’s. These goals are rarely mutually exclusive. People do not come to work every day purely for the good of the corporation. The two purposes often align around serving the customer. Whether it’s doing work that’s challenging and stimulating, working synergistically with a tight-knit team, or being associated with a good job in a well-known company – help people to understand that unifying driver.

In our work with clients, planning a successful meeting to kick off a new project is something we see as critical to developing a high-performing team. My advice to team leaders is: Don’t be afraid to show your vulnerability, your humanity. It’s amazing how readily others respond when you allow people to see you with empathy. It opens employees’ porosity to the bigger message you’re trying to get across – the goals the team is trying to achieve.

Equally important is to structure a small, but significant first challenge that will move everyone on the team toward the eventual goal. It has to be something that every team member can contribute to and has a hand in designing. And it needs to be something that can be achieved quickly, ideally within 60-90 days.

In our work with a major automaker, we quickly realized that the relationship between the company’s district managers and its dealers was broken, with district managers maintaining a traditional command-and-control environment in which they interacted with dealers by issuing checklists and insisting they take product whether they needed it or not. So we challenged 300 district managers to choose a single dealer and turn the relationship around. The results exceeded even our expectations:

- The company earned the highest J.D. Power owner-satisfaction ratings of any American car company
- Customer satisfaction index scores more than doubled to 100% in eight out of 10 surveys
- Fewer repeat auto repairs were needed, increasing customer retention
- “Quick lead” (within five hours) response improved from 30% to 100%
- Market share shifted upward in pilot regions
- All regions have been directed to adopt “new way” behaviors by the end of 2014.

Another important part of launching a new team is getting team members to do something together that unleashes collaboration and innovation. I tend to stick to work-related tasks for the enormous satisfaction of working together on a win that counts, but a number of successful executives I know swear by going with something that puts everyone at ease. For example, building the tallest tower possible using only stationery supplies (no fasteners). This will establish early on that it's OK to share half-baked ideas and try new approaches as well as increasing the rapport between team members. Even I have to admit it's hilarious to watch a virtual team trying to do this using video software like Unify's OpenScape, which let you see up to nine team members at once, Brady Bunch style - and it has the added benefit of getting the team familiar with using videoconferencing.

Keeping the momentum going

What virtual team leaders do at the beginning of a project sets the tone for the team and has the potential to motivate members to deliver their best - but it's not enough. The OnPoint Consulting study mentioned previously shows that excellent lines of communication from the leader are strong predictors of team performance.

Anthropological studies show we're not the only primates who rely heavily on communication from the leader: Baboon troops glance at the dominant male every 20 to 30 seconds on average for cues. This is also true for chimpanzees and gorillas.

Unfortunately, senior managers frequently make the mistake of assuming that sending email updates and holding weekly conference calls

is enough to sustain the momentum generated by the kickoff. It's not. In the absence of visual and body language signals, misinterpretations and misunderstandings often arise, especially on larger teams. And worse, team members feel disconnected and reduce the level of engagement and contribution to the project.

Here's where leveraging technology can be a huge asset. I know of one company that uses an always-on, wall-sized video screen to stay in touch in with team members in Beijing, building relationships virtually and increasing the frequency of collaboration.

Another important way to keep a virtual team focused on its goals is to celebrate small wins along the way. Dan Ariely, professor of psychology and behavioral economics at Duke University, has shown through his research that people are irrational in remarkably predictable ways. Among other findings, his research suggests that public recognition is far more important than financial incentives in the workplace. Despite this, many managers do a poor job of recognizing their people. I'm sometimes amazed by how difficult it is to persuade some executives of the importance of publicly celebrating an employee who exemplifies the behaviors senior management wants to cascade throughout the organization.

Whether you're on-boarding new executives or launching a newly formed virtual team, people need the time and the permission - no, the mission - to develop relationships within the team and within the company. While it may sound more cost-effective to rely on collections of reading material and org charts to get people up to speed, their understanding both of the project and the company's goals will suffer, decreasing their effectiveness.

Don't forget metrics and purpose for social collaboration

Recently I've been talking with clients about social collaboration - whether they use it to communicate internally, and if so, how? What I'm finding is that many of them have implemented social platforms, but a worrying number aren't tracking the right metrics. They look at me blankly when I ask them what success data they have, and say, "I just told you more than half of our staff is using it."

Just because you have an active internal social network doesn't mean it's being used appropriately - and by that I mean to drive business results, often by integration into the core of your organization's workflows.

Mark McDonald, group vice president and head of research for Gartner Executive Programs, has the perfect description for the way a lot of companies implement social media internally: "Provide and pray." According to McDonald's research with 400 organizations, simply providing a social platform and expecting good things to happen fails "about 90 percent of the time"^{viii}. Yet this is an all too common approach. The problem is that while employees may well be using it, they aren't necessarily using it for a clearly defined business purpose. Or any business purpose.

Mark is spot on when he points out that not only do employees need a business purpose to embrace an internal social platform, they also need a "What's in it for me?" reason to adopt the new technology. I couldn't agree more. Ferrazzi Greenlight's Research Institute has examined this issue in its field research and found overwhelming support for the idea that a business that wants its employees to be "all-in" - completely

committed to a business purpose - needs to ensure that employees' own personal purposes are closely aligned with the business purpose. Aligning the two is a critical component of Ferrazzi Greenlight's Change Acceleration Process.

Keeping business processes on track

That kind of synergistic alignment often comes from implementing social collaboration integral to an existing, but complex business process in which there are a lot of moving parts. If you are involved in the business process at a few different points, dropping the ball once in a while is inevitable. Social media coupled with business process management software can keep you on track because others involved in the process are constantly there in the background discussing it, updating the team, keeping the project top of mind. What's in it for the employee? Meeting and exceeding customers' expectations.

The Bank of Tennessee is a great example. As a relatively small community bank with 87 branches, the Bank of Tennessee realized that for a commodity product like mortgage processing, the main value-add it could give customers was speedy mortgage approvals and their potential to lock in lower interest rates. But because the process is driven by federal mortgage laws and banking regulations, that's much easier said than done. Getting a mortgage approved is a multi-step process involving at least seven people - including an external appraiser and appraisal reviewer. In the past it was common for someone involved in the process to get tied up and drop the ball. Email handling of the transaction led to delays and miscommunications.

“Having everyone collaborate socially on a platform that’s mobile accessible is very valuable.”

So the bank started using Appian. Like most business process management (BPM) software, Appian ensures that when a critical portion of the process is complete, the next person who needs to touch it is notified. Pretty standard stuff. But the interesting part is that Appian also includes social collaboration so that all along the way, everyone who needs to be involved in the transaction can participate in an open dialog about it. The combination has made a big difference, reducing the number of mistakes and cutting the internal time it takes to process a loan by between 20 and 25 percent.

“Our loan officers, if they’re on the go in the field, can use mobile social collaboration to get status updates. Do they need to take action? Is there something they need to do to move the process along? Or do they need to give the customer an update on where something is?” Barrett explained. “Having everyone collaborate socially on a platform that’s mobile accessible is very valuable.” Previously, the process the bank used involved a combination of email, faxes, and even “snail mail.”

Better yet, when social media exchanges display within a team-collaboration framework like Project Ansible - tagged, searchable, and filtered by the context of where you are in your process or project timeline - that’s social media helping you focus rather than distracting you.

Pinpointing expertise

What’s another way to marry a business purpose, such as customer satisfaction, with an employee’s personal purposes? Be knowledgeable and helpful to the client by quickly providing contacts for expertise or professional services they need. This is important in any sales job, but particularly in residential real estate because realtors negotiate the most expensive and emotion-fraught purchase/sale most of their clients will ever make. “They want to know if the realtor can recommend an electrician, a plumber, a financial planner,” says Glenn Champion, legal affairs director for Coldwell Banker Weir Manuel (CBWM) in Birmingham, MI. “They expect it.” Being able to respond quickly, with the names of qualified, experienced professionals is a competitive advantage.

To make that process easier, especially for new agents, CBWM implemented an internal forum called “eSpindle.” Realtors in each of its 12 offices in the Detroit area participate. Generally within minutes of posting a request for expertise, realtors receive multiple replies from their colleagues, often with detailed testimonials. Who needs Angie’s List? The information is passed to the client, strengthening the relationship and increasing the likelihood of a referral. A side benefit is that realtors, who typically don’t spend a lot of time in the office, get to know each other through these offers of help.

This is an aside, but something I find quite interesting about social collaboration: Studies show that people are much more likely to be generous and helpful when others are watching^{ix}.

Harnessing collective knowledge

Social collaboration can bring collective knowledge to bear on a problem the company is trying to solve, or to satisfy customer needs.

A multinational petrochemical company needed to be able to accurately answer very technical questions about how to set up production lines for a wide range of complex intermediary products that are crucial in the production of a particular end-user product. The ability to answer those questions, therefore, is critical to the sale of thousands of tons of the product for one of Ferruzzi Greenlight's clients.

Multiply that need over literally thousands of products, and your enterprise faces a serious complexity challenge. Our client chose one of the best ways to handle such complexity: By establishing internal wikis (purpose-built websites containing content that can be collaboratively edited and updated) that could be constantly updated by a small army of expert volunteers within the company who document everything required to support internal and customer questions about production. While it takes time to establish a comprehensive set of wikis - and a culture of contributing to them - companies that succeed in doing so often see internal subject matter experts vying with each other to provide the best/most complete expert information. This is competition focused on excellence in results - a win/win if ever there was one.

Other companies use social collaboration very effectively to tap outside experts to deliver high-quality, just-in-time services. A great example is Specialists On Call (SOC), an agency with facilities in Virginia and California that contracts with 270 hospitals nationwide. For example, when one of the participating hospitals

has a patient arrive in emergency and the doctors determine he needs to see a cardiologist, the hospital contacts Specialists On Call, and an experienced cardiologist not only speaks with the patient through video-conferencing almost immediately, she's able to do a "virtual examination" by directing the attending clinical staff or physician to perform a number of diagnostic procedures while the cardiologist observes.

SOC claims it can cost 40 percent less than the cost of locally based on-call specialists, increase caseload capacity, empower local specialists by relieving on-call burdens, and even result in lower malpractice premiums due to its round-the-clock availability and adherence to best practice protocols.

Too often, social-media collaboration is implemented in its own silo without strong business process connections. Here's how to maximize the impact of social-media tools on business results:

- Identify the processes that will most benefit, and pilot social media integration with those teams. Lead with these process improvement examples when you release your social media tool more broadly; that's the main driver for the investment.
- Resist implementing social media as a stand-alone tool. Integrating it with your tools for communication, collaboration, and/or process flow ensures discussions are relevant to and can positively impact process and/or project participants.
- Explore tools that make exchanges in social media, email and other collaboration tools searchable, and filter automatically based on context. Separating social chit-chat from exchanges relevant to the project at each meeting or milestone creates a cohesive collaboration record and brings participants up to speed quickly.

Countries with a high proportion of trustworthy people are more prosperous...

Keeping virtual teams on the reward side of the fear-reward seesaw

Many senior executives believe that, given the right leadership, their increasingly global organizations will behave rationally, make sound business decisions based on evidence, and chart a course that is most likely to drive growth and shareholder value. The same executives are often quick to dismiss the importance of developing strong relationships at every level, both inside and outside the company.

What they ignore is that organizations are made up of human beings who are driven by instincts and emotions – a veritable chemical soup of them – that cause them to react in ways that aren't necessarily rational or beneficial to the organization. And keeping aware of the impact of that chemical soup is even harder when your team is dispersed.

I founded Ferrazzi Greenlight and the Greenlight Research Institute because I felt that cracking this code – the code of human behavior – was critically important to business success. Our firm specializes in teaching business leaders the relational skills they need so they can connect more deeply with their employees and others around them. The need for these skills is all the more acute today in our increasingly virtual world – where enterprises are spread around the globe and working remotely is commonplace. Organizations don't change. People do. And strong relationships are necessary to change people.

Over and over we have seen that only through strong relationships can business leaders create a genuine willingness

within the company to face significant market challenges, take the risks needed to grow their businesses, and build a rock solid organization in which people trust each other, help each other and rely upon each other. Yet how many of us can say we work for that sort of organization?

I've written a lot about virtual teams, from the ways new project leaders can forge better relationships within their teams to how an organization can tap the enormous power of social collaboration. What I want to do now, having broken down techniques into discrete skills and missions, is to take a step back and look at the neuroscience and neurochemistry that influence our reactions – and the ways in which we can consciously work on keeping our people on the reward side of what David Rock, director of the NeuroLeadership Institute and author^x calls the "fear-reward seesaw." Because that's what it's all about. That's the basic underlying challenge all business leaders face, and it's one that is far more difficult in a world where most of our daily work interactions occur remotely.

The trust hormone

In the early 2000s, Dr. Paul Zak, a neuroeconomist and professor at Claremont Graduate University in Southern California, showed that countries with a high proportion of trustworthy people are more prosperous – more economic transactions occur and more wealth is created – than countries with a low proportion of trustworthy people. So he and his team designed an experiment to test whether there's a biochemical basis for trustworthiness. In it, two people each are paid \$10 to participate in an experiment. One person then is asked whether he wants to give

a portion of his \$10 to the other person, a stranger whom he only communicates with via computer, knowing that the amount he sends will be tripled. Person B then has the option of sending a portion of the money back to Person A. Although traditional economic theory predicts that Person A will simply keep his original \$10, not trusting Person B to share any of his unexpected windfall, experiments conducted by Paul Zak and others demonstrate that a high percentage of people will both send some money and return some. Zak's question was, why?

In Zak's version of the Trust Game, subjects' blood was tested before and after for oxytocin, a hormone previously associated only with reproduction and breastfeeding. His findings showed that Person B's oxytocin increased in proportion to the money received denoting Person B's trust, and this higher oxytocin in turn motivated Person B to return some money - trustworthiness. Oxytocin also increases the desire to be generous toward others in zero-sum settings.

The amazing thing is that small actions trigger the release of oxytocin. A hug. A positive comment in a teleconference. Obvious fairness in interactions. A "like" in social media. A show of empathy and vulnerability by your manager. Zak has tested this in all kinds of different settings - drawing the blood of people in an isolated tribe in Papua, New Guinea and from a British bridal party before and after a wedding. Not everyone is affected equally in all situations - the bride gets the greatest oxytocin increase in the celebration of her joining in a new bond, for example - but the warm glow that accompanies trusting someone is always magnified as that person warms up and is generous in return.

Who's on the outs

This is powerful stuff that has huge implications for how we work. But given how seemingly easy it should be for a savvy manager to win trust, rally her troops around an audacious set of goals, and get everyone working collaboratively toward them by deliberately using techniques designed to stimulate the release of oxytocin in her employees, why don't we see more of this? Good question.

I would say partly because business leaders tend to dismiss the importance of soft skills. Paul Zak would say because at least half the executives are men - and his studies show that testosterone is an oxytocin killer.

David Rock, with whom I had a great conversation recently on Change Agent^{xi}, has another take that illustrates how complex and at times contradictory human drives can be.

Drawing on Henri Tajfel's social identity theory that people form in-groups and out-groups within minutes when they meet strangers - sometimes on the basis of trivial characteristics - Rock says that in the workplace managers are often part of the out-group. This is reinforced when they use fear, evoking the proverbial burning platform, to try to stimulate change in the organization. What those managers don't realize is that people react very differently to those who are in their out-group than those who are in their in-group.

"You have very little empathy with people in your out-group," says Rock. He adds that people who are in your in-group are an extension of you. "When they win, you win; when they're threatened, you're threatened. But people who are in your out-group - when they win, you're threatened."

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However, Rock says, like most things human, these social groupings are not fixed and immutable. The boundaries of the in-group become permeable under certain circumstances.

Two things open up your in-group, he says. “One is shared experience, shared humanity. [You think,] ‘This person is a human being, he’s like me.’ And in that moment you get this lovely oxytocin response that helps to offset the threat response.”

Another thing that can extend the boundaries of your in-group is shared goals, which Rocks says offset the threat response even more than shared experience. “If you combine the two, you can go from out-group to in-group. So if you ask me what is the first thing a leader has to do - it’s that.”

I’ve seen this in my own work with clients, both in face-to-face and virtual settings. I often coach leaders to express vulnerability, because I’ve seen how it accelerates the development of a bond with the people they’re asking to get on board with a new idea or change. I ask the leader to describe the change they think they personally need to make, and how hard they find that change is to make. I’m often amazed how effective this is at reinvigorating people who have become cynical and unmotivated.

Christine Comaford, leadership and culture coach, told me research echoes my experience. “If we feel like a cohesive, connected tribe - if we feel there’s fairness in our company - we light up what’s called the reward network. When a leader brings their team the experience of safety, belonging, and mattering they deliver powerful, emotional food. Being supported, included, and appreciated is the most precious emotional food you can give somebody^{xii}.”

Support your virtual teams and they’ll support you back, driven by a neurochemical soup that keeps everyone’s brains working together even though they’re far apart.

i Lepsinger, Richard; DeRosa, Darleen (2010-09-09). *Virtual Team Success: A Practical Guide for Working and Leading from a Distance* (Kindle Locations 261-267). Wiley. Kindle Edition. companies
ii <http://www.kpmg.com/CN/en/IssuesAndInsights/ArticlesPublications/Documents/Global-IT-Project-Management-Survey-0508.pdf>
iii <http://www.onpointconsultingllc.com/2011/10/the-profile-of-success-building-high-performing-virtual-teams/>
iv <http://businessjournal.gallup.com/content/25834/Discovering-the-Elements-of-Great-Managing.aspx#3>
v Unify press release
vi <http://dbm.com/us/en/doc/onboarding.pdf>

Keith Ferrazzi is founder of Ferrazzi Greenlight, a research institute, consultancy and coaching firm focused on changing behavior in the workplace for scores of the most prestigious organizations. He is Chairman of The Greenlight Research Institute, which partners with thought-leading individuals and organizations on applied research to improve individual employee engagement and personal satisfaction as well as organizational results in this increasingly virtual world.

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viii http://blogs.gartner.com/mark_mcdonald/2011/10/03/welcome-to-the-social-organization

ix http://www.academia.edu/1977022/The_watching_eyes_effect_in_the_Dictator_Game_its_not_how_much_you_give_its_being_seen_to_give_something

x <http://www.your-brain-at-work.com>

xi <http://www.youtube.com/watch?v=6eOdDAoiqco>

xii <http://www.youtube.com/watch?v=v31zcZIGFZk>

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