

**BEST PRACTICES OF
HIGH-TECHNOLOGY GLOBALLY DISPERSED TEAMS**

by

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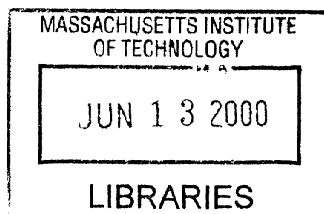
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ABSTRACT

Globalization is changing the way business is conducted. It is a given that people will work in teams separated by time and distance yet stitched together through various forms of technology. Although globally dispersed teams work differently, the literature indicates basic team principles remain relevant.

This thesis explores those characteristics that lead to effective initiation of globally dispersed teams. A brief literature review is provided to summarize several frameworks of effective teams. The review then focuses specifically on the cultural and alignment literature that is often overlooked but is extremely important to global team success.

Interviews were conducted in a high-technology manufacturing company that is in the process of initiating a globally dispersed worldwide quality team. The fieldwork is analyzed using a three-dimensional model, then best practices are identified and recommendations presented.

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Introduction

One of the most common coffee station discussions during the last ten years of the 20th century relates to the incredible acceleration of business. Time and distance seem to blur as traditional boundaries vanish before our eyes and new opportunities are created, developed, exploited, and retired faster than ever before. In order to take advantage of these opportunities, people must be strategically aligned and effective even though they may be located side-by-side, down the hall, or even in another country.

Although authors like Friedman(1999), Hirst and Thompson(1996), debate terms like *globalization*, *internationalization* or *regionalization*, the period they discuss is widely characterized by free-market capitalism conducted seamlessly across the globe as though everybody is in one place all the time.

Friedman (1999) suggests the world has experienced two such eras of globalization: the first from the mid-1800s to the late 1920s prior to World War I, and the second beginning in 1989 with the fall of the Berlin Wall and continuing today. Friedman observes that the first round was driven by falling transportation costs through the inventions of the railroad, steamship, and automobile, which enabled people to move about easier. The second round was driven by falling telecommunication costs and introduction of the Internet. Newspapers are filled with articles that illustrate how the traditional boundaries between politics, culture, technology, finance, national security, and ecology are disappearing. If countries want to play in this new global economy, privatization and deregulation appear to be the table stakes for entering the game of free capital flows and labor movement.

The Web is one of the key players because in many ways it opens the playing field equally to a person doing research on a remote island in the South Pacific just as it does to a large multinational corporation located in several countries employing 1000's of people.

Although this new era of globalization creates many challenges and opportunities, perhaps one of the most exhausting and simultaneously exhilarating attributes of this new period is the changes and innovations as everyone establishes an identity and carves out an existence. People are learning to work differently, with new technology, faster than ever before. Several writers equate this period to running the one hundred yard dash over and over again, as time and distance no longer give breathing space for people to plan their next move.

Globalization creates unparalleled opportunities and at the same time offers new challenges. Although technology can be a tremendous enabler, it can also strip away the face-to-face interaction that helps people build relationships and develop trust. Teams and team members also have to simultaneously deal with local issues and global issues. On one hand, dispersed teams have group objectives that are hopefully shared by all, yet members in regions have to deal with local issues including culture, priorities, agendas, and politics. With the fall of traditional geographic, economic, financial, and technological walls, these new challenges emerge.

This thesis focuses on the startup phase of a globally dispersed worldwide quality team within a high-technology manufacturing company. Interviews were conducted at corporate headquarters in the United States and at two regional locations -- one in another state and one in Europe. The focus is to understand the local versus global issues affecting the startup phase of a globally dispersed team.

Chapter One provides a literature review of global team frameworks with emphasis on the cultural and alignment issues associated with startup. Chapter Two provides an overview of the organization and interview framework. Chapter Three contains analysis of the interviews within the context of the framework. Finally, Chapter Four contains summary comments and recommendations based on an analysis of the literature and interviews.

Chapter One

Literature Review

This chapter creates a common language for the remainder of the thesis and a foundation for interview analysis and recommendations. The literature review defines teams and global teams, then briefly reviews several leading frameworks that describe key themes important to global team success. The review concentrates on the cultural and local versus global alignment issues that can be easily overlooked during team startup. Lastly, the chapter concludes with a visual representation of an alignment framework.

A team is a small number of people with complementary skills who are committed to a common purpose, performance goals, and approach for which they hold themselves mutually accountable.

(Katzenbach and Smith, 1992).

Co-located teams accomplish these objectives with team members in the same physical location, generally within a 50-foot radius of one another (Lipnack & Stamps, 1997). **Virtual teams** are comprised of team members who are separated by several floors, different buildings, multiple cities or countries around the world (Lipnack & Stamps, 1997). For the purpose of this thesis, I will use the terms *globally dispersed team* and/or *virtual team* to refer to dispersed teams with members working on at least two separate continents. Although authors have various perspectives on ideal team size, most suggest 4-20 people is the ideal range.

The literature on team frameworks contains a variety of models that are helpful in thinking about critical components of co-located or virtual teams. The models range from broad categories to specific checklists. Although the level of detail changes depending on

the author, the content remains similar -- alignment through clearly articulated goals, people with the right skills, and an effective approach.

Lipnack and Stamps (1997) present a three-prong model that captures these virtual team components:

- People – independent members, shared leadership, integrated levels
- Purpose – cooperative goals, interdependent tasks, concrete results
- Links – multiple media, boundary crossing interactions, trusting relationships.

The model expands the three components into nine virtual team principles. The principles emphasize independent, interdependent, and integrated components in each of the categories.

Duarte and Snyder (1999) take a more “how-to” approach using a checklist-style approach to their model, which includes:

- human resource policies
- training and development,
- standard organizational processes,
- electronic communication and collaboration technology,
- organizational culture,
- leadership and
- competence.

Duarte and Snyder use tabular ratings to assess team readiness and identify challenges.

Ancona (2000) presents another view that she terms Net Teams -- groups that have four parts that work together.

- Part 1: core, operational, and net layers of the organization. The core layer consists of the founding members and people responsible for the group purpose and key strategic decisions. The operational layer is largely responsible for the work, while the net layer is periodically involved depending on the phase of the project or based on their specific expertise.
- Part 2: fluid membership. This part argues that in virtual organizations the team membership changes frequently as members shift in and out of the team and across layers.

- Part 3: external orientation and three supporting roles. Scout (fosters and maintains information structure), Ambassador (external relationship building), and Task Coordinator (structure work flow).
- Part 4: external ties. Stresses the need for strong contacts but different strengths of external ties depending on the frequency of access.

Kostner (1994) develops a virtual leadership model using the fable of King Arthur and the Knights of the Round Table as a metaphor. The narrative illustrates six key components for virtual team success:

- Power and control come from the team not the leader
- Strong symbols pull teams together
- Relationships need to be purposefully constructed
- A clear and compelling vision is essential
- Fairness is critical
- Equality in information sharing is vital.

There are additional models available in the literature. These four models demonstrate the diversity of approaches -- from abstract concepts, to exact checklists, to lessons from mythical characters.

Although the models use different approaches, the important themes of purpose, alignment, technology, communication, culture, and trust emerge across the literature. And although the same principles apply to co-located teams as to virtual teams, virtual teams experience added complexity in the areas of trust, alignment and culture. Virtual teams often have to balance local priorities with global team objectives that are seldom perfectly aligned. Team members can feel trapped trying to attain collaboration locally and globally, often with little success. Different cultural issues may result in miscommunication, wrong assumptions, and different levels of commitment, all making trust difficult to establish. So I will briefly examine these three factors: trust, culture, and alignment.

1.1 TRUST

McDermott (1998) states:

... in a collaborative relationship, it is recognized that all team members bring valuable assets, knowledge, and skills to the team. What they can achieve together is more than what they could achieve on their own. Interacting in an open manner, they are willing to exchange information, examine issues, and work through any conflicts that arise. Trust is a vital element and is reinforced by treating each other with respect and integrity. (p. 254)

Duarte (1999) suggests, “without trust, building a true team is almost impossible...the qualities of the first interactions among team members set the tone” and “models of trust that focus on building long-term relationships may not apply to many virtual teams” (p. 139).

Again, the literature contains multiple frameworks for trust. Jarvenpaa (1998) suggests a framework comprised of ability, benevolence, and integrity. Ability refers to group skills to carry out the task. Benevolence focuses on interpersonal care and concern. Integrity aligns actions and words to demonstrate dependability and reliability.

McDermott (1998) considers respect, truthfulness, consistency, and a posture to win, as key components in building trust. Bailyn (1993) indicates the future “...will be a world based on trust, one in which employees will be assumed to be responsible for their work without the imposition of detailed operational controls” (p 139). Bailyn also states that old assumptions were based on a control paradigm managing through input (constraining), whereas in the future trust will be established by holding people accountable for results. Duarte (1999) suggests performance, competence, integrity, and concern for the well-being of others are three key factors in building instant trust in a virtual environment.

Meyerson (1996) supports the importance of swiftly building trust where groups are formed quickly or come together temporarily. These groups frequently lack a formal

structure and have little time to sort out what knowledge each member possesses; yet the tasks are often complex, interrelated, and involve high-risk and high-stakes outcomes. Meyerson believes these groups are connected by a different type of trust called *swift trust*, which develops almost immediately to manage issues of vulnerability, uncertainty, risk, and expectations. Generally in these situations the tasks are less well understood, members often have never worked together, and they have diverse functions or skills. Because the tasks are complex, team members must immediately engage one another to identify potential solutions. The result is rapid trust built through interdependence.

The unique nature and significance of the tasks also contribute to the interdependence and help generate swift trust. Meyerson indicates vulnerability, tight deadlines, and risk can help the new team quickly reduce uncertainty with each other more quickly, and team members may automatically choose to trust each other because they are thrown into a similar situation of needing each other.

Although the literature takes different approaches to building trust within virtual teams, there is common agreement that it is absolutely necessary for success. Ideally, new teams will want to build swift trust as early as possible and then work deliberately to maintain it.

1.2 CULTURE

Culture and alignment are the cornerstones for increasing the likelihood of team success. I will exam culture first and then extend this to create an alignment matrix that will be used to examine the field data.

Schein (1996) defines three organizational cultures that frequently do not understand one another but exist in most organizations. He defines culture as “a set of basic tacit

assumptions about how the world is and ought to be that a group of people share and that determines their perceptions, thoughts, feelings, and, to some degree, their overt behavior”

(p. 11).

Culture manifests itself at three levels: the level of deep tacit assumptions that are the essence of the culture, the level of espoused values that often reflect what a group wishes ideally to be and the way it wants to present itself publicly, and the day-to-day behaviors that represents a complex compromise among the espoused values, the deeper assumptions, and the immediate requirements of the situation. (p. 11)

The three groups are referred to as the Executive Culture, the Engineering Culture, and the Operator Culture. According to Schein, the **Executive Culture** is financially focused to ensure returns to shareholders and society. This group has a hierarchical and individual focus, and the value of relationship and community weakens as responsibility increases. The Executive Culture often views themselves as “the embattled lone hero” (p.15). The Engineering Culture “is one of elegant machines and processes working in perfect precision and harmony without human intervention” (p.14). In the **Engineering Culture**, Schein believes engineers want operators to change to match the mechanical or computer systems. These shared assumptions are based on common education, work experience, and job requirements. The **Operator Culture** evolves locally in each organization. Much of this culture is developed through human interaction based on high levels of communication and teamwork. “The required knowledge and skill are local and based on the organization’s core technology” (p. 13).

1.3 ALIGNMENT

Schein's model identifies a potential problem that can negatively affect alignment across groups and helps explain alignment within groups. He believes the Executive and Engineering cultures are part of a worldwide occupational community external to the organization, whereas the Operator culture is built internally within the organization. Because the cultures think quite differently, they often see opportunities quite differently. "Whereas the IT specialist saw networking as a way of eliminating hierarchy, executives saw hierarchy as intrinsic to organizational control and coordination." (p. 16). Consequently, even if members of the Executive or Engineering cultures learn to relate to the Operator culture, replacement personnel will probably revert to the stereotypical engagement model. The takeaway is that the Executive and Engineering reference points are external to the organization and are therefore self-enforcing. Further, creating alignment is more about creating sufficient shared understanding rather than determining who has the right view and who is wrong.

Although Schein's model seems somewhat stereotypical, I believe the principles can be applied generally within organizations and can expose potential blind spots that may cause alignment problems. As an example, senior executives often sponsor new initiatives based on financial drivers or corporate metrics. The initiative is frequently delegated to an engineer who is process- and system-focused. However, the actual implementation may fall to members of the Operator culture where working together builds on the cornerstones of communication, openness, mutual trust, and commitment. Each of the cultural groups value different success criteria. It is easy to see potential disconnects that can be imbedded within the three cultural layers.

The literature on virtual teams identifies key elements that are important for optimizing success. Schein's work illustrates how alignment may exist within groups but potentially break down across groups. Also, from my own experience, organizations often create ways of doing business or cultural norms that affect trust, alignment, and communication globally. Virtual teams have to account and respond to all these different factors because of their geographic diversity. If a virtual team can see clearly across and through the organization, they may be able to better position themselves for success.

1.4 THE ENVIRONMENTAL SCAN FRAMEWORK

As a team leader, I often wrestled with trying to 'see' where my team was well-connected and where alignment broke down. I found it easy to work at one level believing that everyone was speaking the same language and in agreement then later realized I had misunderstood what was happening at another cultural level or geographic region. The framework is meant to accommodate different team models, depending on the practitioner's preferences and the current team focus. The purpose is to assist newly formed virtual teams in achieving superior alignment.

The model contains three layers and a team factors section. The layers (referred to as Foundation, Group, and Regional) help identify local versus global issues, while the team factors allow the practitioner to select specific key success areas.

- **Foundation Layer.** The foundation layer identifies existing cultural norms that reach across the organization. These norms may serve as leverage points to improve team cohesiveness and alignment, or alternatively, as challenges that should be identified and overcome.

- **Group Layer.** The group layer identifies logical breaks in the organizational group culture that are relevant to a particular organization. The grouping should be based on similar traits, reference points, or commonly shared success factors within each group.
- **Regional Layer.** The regional layer identifies unique trends across geographic boarders. Regions may be defined based on organization charts, manufacturing facilities, sales areas, geographic boundaries, or some other factor, but the purpose is to identify differences based on physical distance.
- **Team factors.** The team factors capture key components that are pivotal to success. Factors may be defined from the virtual team literature, some aspect of the team design, or something else key to the team’s future within the global organization.

1.5 FRAMEWORK TEMPLATE

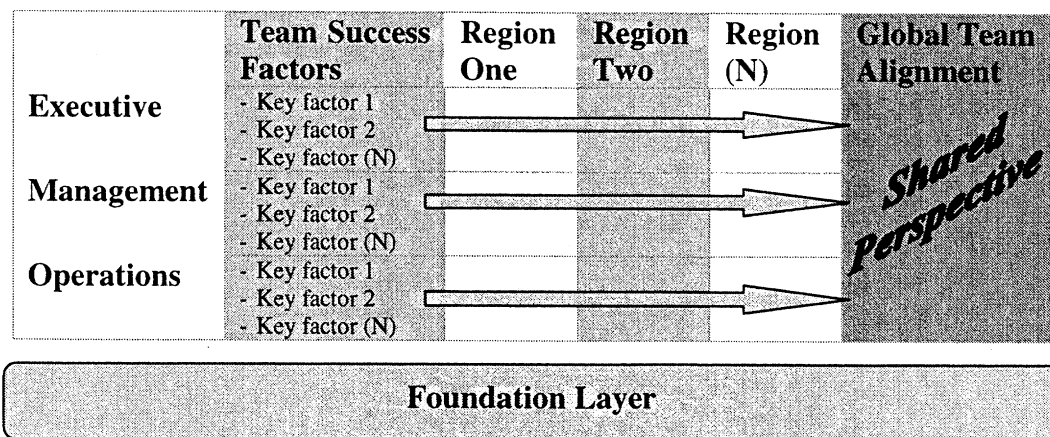


Exhibit 1-1. The Framework Template

1.5.1 Framework Implementation

The environmental scan should be conducted as soon as the project receives executive sponsorship. The person with overall responsibility for the initiative, or the leader of the virtual team, are best suited to implement the framework. The leader should identify the regions and cultural groups along with any obvious cultural norms evident throughout the organization. They should also identify the most important critical success factors for the specific situation; the virtual team literature serves as a good reference. Interviews are then conducted with stakeholders among the cultural groups across the various regions. Key success factors requiring attention are identified and action plans developed. In summary, the purpose of the framework is to provide a flexible matrix to assist global teams in achieving multi-dimensional alignment locally, globally, and culturally. I will use this framework outlined in Exhibit 1-1 to analyze the interview data in Chapter Three.

Chapter Two

Implementing the Framework

2.1 BACKGROUND INFORMATION

2.1.1 The Company

The company is a leading high-technology manufacturing firm based in the United States with manufacturing facilities in Europe, Asia, and South America. To maintain confidentiality and preserve corporate identity, the organization will be called TechCo. The company was founded in the 1980s and has developed world-class expertise in logistics, supply chain management, and customer care. Nearly 70% of TechCo.'s product is sold to governments and large corporations.

Since 1996, TechCo. has sustained earnings increases of more than 40% year to year driven by aggressive expansion of its manufacturing facilities. The organization has approximately ten global corporate metrics in areas such as customer focus, business performance, and manufacturing performance. Key metrics are updated daily and displayed throughout the organization, from the manufacturing floor to every desktop attached to the corporate intranet.

2.1.2 The Situation

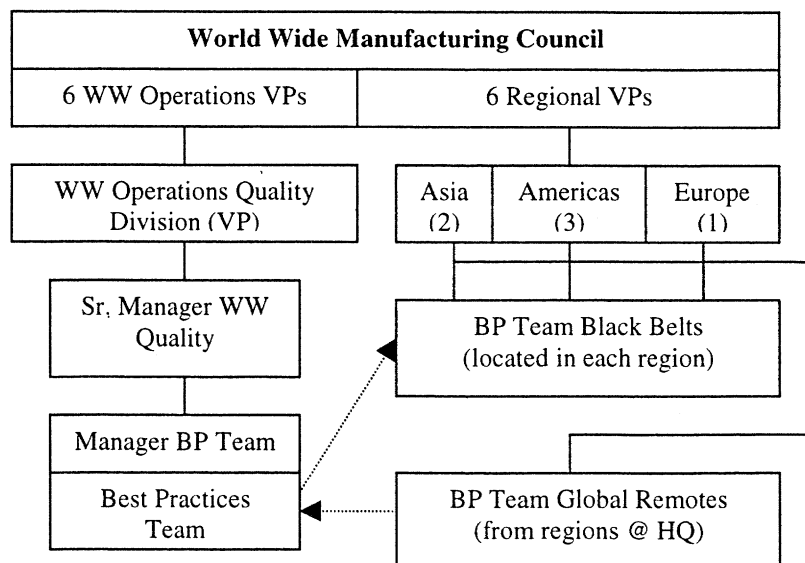
TechCo. is creating a virtual team that will identify and implement global best practices associated with factory startup and retrofit. The executive sponsor sold the team concept to his peers and delegated formation of the team to one of his direct reports. Preliminary documents outlining the team purpose and initial project schedule were circulated.

2.1.3 The Team

TechCo.'s Best Practices (BP) Team (again, disguised) was conceived in October 1999 with the vision: *"to accelerate the process maturation cycle by focusing regional activity into global efforts"*. Because TechCo. has grown largely through expansion of its manufacturing capabilities, the capture and distribution of its best practices are increasingly important to sustained growth. Therefore, BP Team's first objective is to capture best practices of local factory startup and turn them into global best practices for future factory commissioning activities. This is particularly important to TechCo. because the company's growth strategy involves commissioning several new factories in 2000.

Although BP Team reports to the Worldwide Operations Quality Division, the World Wide Manufacturing Council provides strategic direction. The Council is comprised of six regional vice presidents and six operations vice presidents. The Vice President of the Quality Division is the executive sponsor of the BP Team. The Senior Manager Worldwide Quality has operational responsibility for the group and for overseeing the team's formation.

Exhibit 2-1. Organizational Chart



2.1.4 Team Structure

The BP Team will have members located at headquarters and at each manufacturing facility throughout the world. Each region will nominate one *Black Belt* candidate (TechCo.'s term for a best practices specialist). The Black Belt will reside at the regional location, will have participated in TechCo.'s Six Sigma quality program, and will have already successfully delivered a minimum of \$100,000 in project savings in order to obtain certification. The Black Belt will be responsible for locally implementing global best practices at both existing and new manufacturing facilities.

Each Black Belt will have a Global Remote partner stationed at U.S. headquarters. Each region will provide one Global Remote who will represent the region and focus on standardization of best practices and site-to-site coordination. The Black Belts and Global Remotes will have a dotted-line reporting relationship to the BP Team Manager and a solid-line reporting relationship back to their respective regions.

The team also has a Success Stories Facilitator located at headquarters. This person developed and implemented a methodology that had been used for capturing existing efficiency success stories and presenting cases for potential efficiency improvement. The methodology involves documenting the relevant processes and creating a visual storyboard that describes the improvement. Full-motion video is used to further communicate the efficiencies via the corporate intranet. This person recently became a member of the BP team.

Finally, BP Team has two process specialists who develop new processes or modify and improve already-existing manufacturing and support processes.

Because BP Team was being formed while the thesis interviews were being conducted, not all team members had been identified. The Black Belts and Global Remote

positions were largely unfilled. The Success Stories Facilitator joined BP Team the previous week, and the Team Leader was selected one day before the interviews. This offered a unique opportunity to study the formation of a globally dispersed team within a high-performance organization.

2.2 THE FRAMEWORK

Now I will begin loading the framework with team-specific data that can be plugged into the three components of the framework: (1) cultural groups, (2) team factors, and (3) team regions.

2.2.1 Cultural Groups

Three cultural groups were identified. The Executive group fits within the definition described by Schein. Members of this group all have profit and loss responsibilities across a large organizational span of control. Titles in the Executive group include General Manager, Director, Vice President, and above.

The Senior Management group typically reports to a member of the Executive group and is responsible for several smaller groups. This group generally has responsibility for systems and processes along with several teams.

The Operational Management group reports to the Senior Management group and is responsible for leading specific initiatives as defined by the other layers. Generally it has direct contact with the factory floor or equivalent.

2.2.2 Team Factors

I selected nine team factors -- some from the literature, some team-specific items, and some from portions of the structured interview questions. Factors were selected because of their importance and relevance to BP Team's specific situation and the research project. Each factor is described briefly below

- **Corporate Strategy.** Each interview began with a general discussion of TechCo.'s overall corporate strategy, challenges, and direction as it relates to continuous improvement. As BP Team's focus is the identification and adoption of global best practices, it seemed relevant to understand how the various groups viewed the topic.
- **BP Team Purpose.** Questions were asked to understand perspectives of the BP Team purpose. I was interested to learn if there were differences in perception by level or region.
- **Metrics.** Metrics are pervasive in TechCo. and will be important in the evaluation of BP Team's success. Questions were designed to understand perceptions of metrics at the corporate, BP Team, and personal levels.
- **Black Belts.** As TechCo.'s Black Belts represent the corporate Six Sigma program, it seemed important to understand the various perspectives of the group and what level of support the black belt concept had within the organization.
- **Culture.** BP Team's objective is to move TechCo. toward improved collaboration and sharing of global best practices. Thus, it was important to understand the team members' perception of organizational receptiveness to a more structured change management environment.
- **Trust.** As trust is an important ingredient in team formation, I felt it was appropriate to understand various perspectives on the topic.
- **Best Practice Process.** As much of BP Team's focus is aimed at identifying and standardizing global best practices, I wanted to understand the local and global perspectives of the discipline.

- **Technology.** Questions were designed to discern what technology TechCo. found most helpful to their activities and if there were any issues of technology that might affect an ability to capture lessons learned.
- **Plus/Delta.** A senior change management consultant suggested the technique of asking a Plus/Delta question. The idea is to give the person being interviewed the opportunity to convey whatever he/she feels is significantly positive and important that should be maintained at all cost, and anything that the person feels is negative and needs to be changed. Although initially this seems overly generalized and unstructured, I consistently found that it generated valuable data.

2.2.3 Team Regions

Three regions were identified; two regions in the United States – headquarters and the newest manufacturing facility in another state -- and the European region, the original international factory.

2.3 INTERVIEW OVERVIEW

Eighteen interviews were conducted, from January 11-20, 2000, at three manufacturing location -- two in the U.S.(one at headquarters and one at the newest facility located in another state), and the third in the original overseas manufacturing facility located in Europe. The classification of interviewees is shown in Exhibit 2-2.

<i>Executive Group:</i> Vice President or equivalent	5
<i>Sr. Manager Group:</i> Sr. Manager or equivalent	6
<i>Manager Group:</i> Manager or equivalent	5
<i>Other</i>	2

Exhibit 2-2. Breakdown of interviews by employee classification

Three interviews were with BP Team members: the Manager, the Success Stories Facilitator, and one of the two process analysts. The remainder took place with individuals associated with the team in various capacities, including: the Vice President who was the team's sponsor, World Wide Quality Counsel executives, Senior Manager World Wide Quality, customers, regional Black Belts, Quality Managers, and other related stakeholders.

The interviews captured thoughts, perspectives, and opinions based on point-in-time observations. Specific comments were used to introduce themes present at this specific time of the team formation process. Specific and/or isolated perspectives should not be treated as generalizations or widely held opinions but are rather indicative of an individual's thoughts at that moment. Further to this point, the interviews serve as a reference point to advance the study of global teams -- specifically team formation, initiation and implementation -- rather than making the evolution of BP Team the primary focal point of concentration.

Interviews were conducted one-on-one, following a semi-structured format and were one hour long. All interviews began with an overview of the MIT global team project. It was confirmed that interview participants had become involved voluntarily and that all comments would remain confidential. I took written notes during the interviews, summaries were typed, and additional appointments and follow-up conversations were held to clarify information.

Interview results are summarized first by category, then by region and level of the participants. Interview participants were grouped as Executive, Senior Manager, and Operational Manager. This grouping either matched a portion of the individual's actual title or served to capture his or her level of responsibility within the organization.

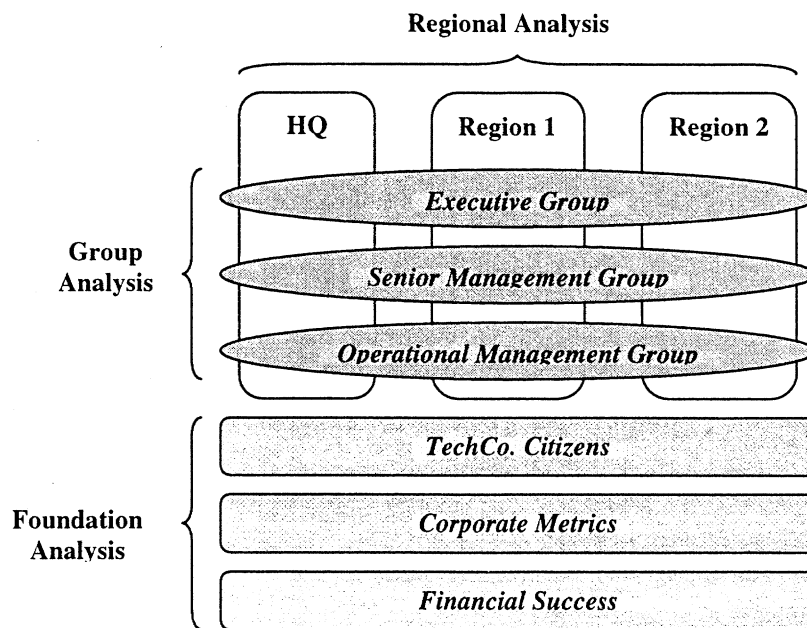
Chapter Three

Analysis

After completing the interviews, the data was analyzed from the perspectives of foundation, group, and region. In addition, the interviews were complemented with casual hallway conversations and my own observations of daily work activities and socialization behaviors. The purpose of this analysis is to identify distinguishing themes of similarity or differences that might help the new global team gain better traction through heightened awareness and a more responsive plan. Throughout the analysis, direct quotations are in italics.

This chapter begins by examining the three foundation themes that were identified, then analyzes the interview results by the cultural groups and regions. Local versus global differences are identified. The chapter concludes with summary comments.

Exhibit 3-1. Filling in the Framework



3.1 FOUNDATION ANALYSIS

First, many of those interviewed referred to themselves as “TechCo. Citizens”, and they said that such a perception influenced how they made decisions.

Second, Corporate Metrics created a common reference point that linked the organization together.

Third, Financial Performance and a company-wide stock plan appeared to create a common reference point for the 30,000+ corporate owners.

3.1.1 The TechCo. Citizen

The strongest theme conveyed by the interviewees was a sense of being a “TechCo. Citizen”. Staff at all levels are proud of their association with this company. Most people said they enjoy the results-oriented, fast-paced, and opportunity-rich working environment, as represented in comments like *“the culture is inclusive and action-oriented”* because *“staff are involved, they feel in control”*.

They take pride in being employees of this aggressive, growth-oriented organization, and there is virtually universal support for the CEO. Many of the people interviewed came from various other brand-name high-tech and manufacturing firms. Everyone seemed to be very competent and results-oriented. Several people told stories of their recruitment by TechCo. Virtually everyone indicated they were attracted by the action-oriented culture, competitive compensation, and the opportunity to work in an organization that was relatively free of politics and the cultural bureaucracy they had experienced in their previous companies; they felt they could make a difference at TechCo. Several individuals spoke about the multi-phase interview process and expressed pride that they were selected to join

the TechCo. team. One person indicated he could not believe TechCo. was willing to pay him so much money to work in such a great environment.

Where people did not know information they made efforts to extrapolate or infer the direction or intent. People seemed to expect ambiguity in the organization because of its rapid growth, and they accommodated not having all the information. Even when they expressed frustration with a situation, they generally remained action-oriented and future-focused rather than blaming or accusing others of wrongdoing. People seemed genuinely interested in seeing the bigger picture and not dwelling on minor annoyances.

During several interviews with new BP Team members or new people associated with the team, it was clear they did not know the team objectives or priorities, or status of the team's formation. In another case, a senior person associated with BP Team had made a significant decision that could potentially impact a junior person working with the team. This offered a good opportunity to test the "TechCo. Citizen" concept. I asked the person how this lack of knowledge made them feel. They responded "*We all work for [CEO's first name] and we will make the right decision for [the company]*".

This corporate family cohesion seemed to be a reference point in decisionmaking, teamwork, and daily interactions. The concept also appeared stronger within the Senior Management and Operational Management segments.

3.1.2 Corporate Metrics

As with most manufacturing firms, TechCo. is a metrics-driven organization. At the global corporate level, the organization uses ten corporate metrics broken down into three targets for daily to annual objectives: (1) Customer Focus, (2) Product Quality, and (3) Business Performance. Employees receive the bulk of their bonus compensation based on

the overall organization's ability to meet or exceed these targets. The ten metrics are updated daily and made available to every employee through the corporate intranet. Factory production numbers are updated in real time and displayed on digital panels on the factory floor. According to those interviewed and based on the examples provided, corporate metrics are primarily velocity-driven based on factory production numbers, financial results, and customer focus metrics. Culturally, the organization is highly focused on "making the numbers" and obsessively trying to enhance the customer experience.

Many interviewees said they understood the corporate metrics and how their personal expectations related to the corporate targets. People in transition between assignments said although they did not currently understand their individual metrics, they anticipated clarity soon.

Some interviewees, however, said they did not have personal metrics or the ones that were defined were not clear. They indicated this situation had existed for several years and had caused them considerable personal frustration. Those people said they liked their boss and felt he was just too busy to sit with them. Others expressed deeper frustration with the chronic problem. The problem was most pronounced further away from headquarters.

The extent of corporate metrics also helped people understand the potential value of BP Team. Although approximately 50% of those interviewed did not know much about the specifics of BP Team, they quickly extrapolated how the group might improve key corporate metrics and consequently viewed BP Team positively.

Throughout the interviews, corporate metrics seemed to act like a beacon, giving everyone a sense of focus and purpose; conversely, their absence caused discomfort because clear measures appear to be a cultural norm. Metrics appeared most clear at headquarters and less clear as distance increased. Most people agreed metrics were clear at the corporate level

and less reliable and standardized at the factory level. Metrics are key to creating and maintaining alignment at TechCo., and when they are missing it causes some unrest.

3.1.3 Financial Success

TechCo. is financially sound and growing rapidly. During the last eight years the stock has split seven times. Since 1996, TechCo. has sustained earnings increases of more than 40% year over year. The extensive stock option and share purchase plan that extends right down to the factory floor has created many TechCo. millionaires.

The sustained financial success adds to the foundation that unites and motivates employees toward common objectives through clear corporate metrics. The financial success also seems to give TechCo. employees added confidence and willingness to take on bold initiatives. TechCo. aggressively adjusted its product strategy several times to gain a leading market position where it previously had no market presence. As one person said "*We got where we are by being bold, why should we change now?*".

Although TechCo. operations span six countries, the three segments -- the TechCo. Citizen, corporate metrics linked to individual performance, and sustained financial success - - create a strong foundation that reaches across distances to bind the employees together. This helps explain why those interviewed support the BP Team concept, even with little background knowledge. The BP Team supports the financial and corporate metrics, while the BP Team leader is an experienced and well-regarded TechCo. Citizen. This foundation-level alignment may give the TechCo. team permission not found in many organizations and contribute to building the *swift trust* described by Meyerson (1996).

As we shift to the Group analysis, the interviews uncover different perspectives.

3.2 GROUP ANALYSIS

As the second piece of the framework (refer back to Exhibit 3-1), the Group analysis is valuable because it helps illustrate different perceptions among the cultural groups. It would be easy for the new team leader to take the Team's executive sponsor on a "road show" of the various regions to tell them about the new team. Although the road show shares information, it does so from an internal team perspective but does not necessarily meet the needs of the various cultural layers. By having this broader perspective, the global team may have a better chance at creating alignment and generating buy-in across and within the various groups.

3.2.1 Executive Group

Everyone in the Executive group appeared to be highly skilled and very knowledgeable. Each articulated an insightful vision grounded on solid industry knowledge. While the entire group supported the BP Team concept and spoke generically about why it was important, with the exception of the executive sponsor the rest of the group had little additional knowledge of the Team's objectives or its current status. Also, while discussing TechCo. strategy, the Executive group did not communicate a shared set of priorities. The responses appeared quite different, consequently I did not perceive a shared purpose beyond improving best practices.

During the interviews, the executives were open and forthright, and indicated that much of their thought about the BP Team was evolving. This perspective was illustrated in comments like, "*[the plant site] has implemented American best practices without understanding the context of the solution. The result was less success with the best practice because in reality [plant] was trying to solve a different problem.*"

At the same time, some members of the group appeared removed from cultural sensitivities surrounding change issues identified by others. Certain executives did not seem to be aware of alignment or priority issues within their organizations even though their staff indicated the problems had existed for several years. As with most executive groups, according to Schein (1996), their focus appeared aimed at the numerical health of the organization.

3.2.2 Senior Management Group

The Senior Management group seemed to be highly skilled and accomplished professionals with strong track records. They were generally well-informed and quite honest in assessing their own actions and the actions of others. They were confident in their ability to succeed. Members of the group who were closer to headquarters expressed greater feelings of being in control of their priorities and objectives. These individuals all seemed to be comfortable acting boldly, taking risks, and were willing to make big decisions and ask for forgiveness later.

The group expressed a high level of trust for one another and told stories of how they had either worked together in the past or why they thought another member of the group was a quality individual. This group was an avid supporter of the BP Team concept because they believed it was the right thing to do and it would make their lives easier.

Several members of the group expressed a desire for clarity of purpose and shared priorities with the Executive group. That concern became greater as the distance from headquarters increased. Some members expressed concern about being tired, worn out, and somewhat disenchanted. The headquarters group emphasized participation from the regions,

while both regions expressed a desire to create a more proactive relationship with headquarters.

Several members expressed frustration with politics, unclear management objectives, and poor planning methods. They said this made it difficult to devote time to new initiatives like the BP Team. Individuals in this group described activities that they had initiated in an effort to create greater clarity and focus within their span of control. Without knowing this perspective the BP Team might assume a particular region or group is purposefully being uncooperative when in reality they might be trying to participate within given constraints.

3.2.3 Operational Management Group

This group expressed a common loyalty toward TechCo. and a belief that their contributions made a difference. Individuals spoke passionately about their projects and generally had data available to show the value-added results.

Trust appeared high, which in turn drove a strong communication of commitment and loyalty. During conversations, members of this group always took the higher ground in moments of uncertainty or ambiguity. They highly valued Senior Management and Executive interaction, involvement, and approval; several individuals said they hoped that such contact did not disappear as the company continued to grow.

The group communicated a strong desire to see a more systematic approach to best practices. While they acknowledged that progress has been made, at the same time they recognize that the reward system compensates the higher numbers. One member wondered if the Executive group would continue to sponsor the BP Team initiative once they realized how much compromise and change would be necessary.

To illustrate the point, a factory manager told a story to illustrate his belief of cultural fixed thinking. An employee on the factory floor was stooped over to insert a component into the equipment as one part of the assembly process. The manager asked the worker if a chair would be helpful, and the worker agreed. The manager asked the factory process specialist if they could get this individual a chair. The process specialist said it would not be possible; what would the CEO think if he saw this person sitting down to do his job? After an unsuccessful discussion, the manager escalated the issue to the process specialist's supervisor and got the process changed and a chair provided for the worker. The manager's message was that process improvement is getting better but at least in this region people are entrenched in their thinking.

This Management group also seemed to believe that it would be difficult to change deeply embedded habits, especially when they are predicated on speed. One region also expressed concern about workforce management from two perspectives: the tightening labor market, and attrition because of unclear management objectives.

A common theme within the other levels suggested that a more common language within the Executive Group would improve clarity and improve project efficiencies. The Senior Manager group indicated a need for clearer priorities and expectations. Unclear signals and mixed messages are contributing to less trust, and the severity of the problem increases with geographic distance. Data suggests that the Manager group desires more interaction and communication with the senior levels of the organization.

3.3 REGIONAL ANALYSIS

In this third framework segment (refer back to Exhibit 3-1), three regions are identified: (1) the headquarters region, (2) the newest manufacturing facility in another state, and (3) the European region, which was the original international factory.

3.3.1 Headquarters Region

The interview groups from Headquarters focused heavily on improving global best practices through sharing knowledge throughout the organization. Virtually everyone I spoke with was highly focused on the corporate targets and generally understood how the targets applied to them. There was uneven awareness of the BP Team at all levels, including those individuals who are working directly within the project team. Staff seemed accepting of ambiguity and were comfortable that details would emerge in time and that they would be given opportunity for input.

There was a strong sense of corporate identity and trust of one another and the corporation. Three interviewees had worked together at another company which further cemented their trust and comfort with one another.

The Black Belt Six Sigma concept appeared to be deeply entrenched in conversations and seemed to be taken for granted. At the same time, most conversations acknowledged that best practices were captured inconsistently, and that the practice was largely at the discretion of the factory manager. TechCo. Success Stories on storyboards were visible on walls at several locations throughout factories at headquarters.

Executives were generally concerned with knowledge management, corporate targets, and reducing complexity. The Senior Management in this region group was generally confident and communicated a sense of empowerment and control. The Manager group also

spoke with confidence, communicated a strong desire to succeed, and accepted some level of ambiguity. Most conversations focused on process, technology, and the logistics of moving forward. There was little worry about politics, trust, or cultural issues. A few candid comments expressed the importance of regular communication with their boss and that it should be preserved as the company moves forward.

In general, Headquarters' perception of regional stereotypes were mild, but there were several comments which implied that Region One would be more receptive to the BP Team initiative, and that Region Two (the European region) would be more resistant. Comments were made, such as, "*It will be real interesting to hear what Region Two has to say about this...*" and "*Sure there's alignment here, but wait until you talk with Region Two*" and another said, "*Region One is new, this shouldn't be a problem*". The comments were not overtly negative but they did seem based on past perceptions.

Overall the interviews conducted at Headquarters revealed an extremely high level of alignment, commitment, trust, and pride in being a TechCo. employee.

3.3.2 Region One

People interviewed in Region One were very focused on corporate objectives, making the numbers, and meeting expectations. The pace seemed particularly hectic; perhaps a result of the factory opening earlier in the year. Hectic work schedules kept individuals from reading the BP Team briefing paper; there were several interruptions during the interviews; meetings were shuffled, urgent telephone calls taken, and e-mail sent. That said, the individuals understood their roles and felt they were well-positioned to succeed.

Region One staff acknowledged that some lessons learned were captured well but also recognized there was more that could be done. Region One indicated there were

opportunities to work more collaboratively with Headquarters, especially lessons relating to supplier relations. The staff seemed to feel Headquarters would take action without consulting or informing the appropriate Region One staff, which resulted in inefficiencies. Region One also stressed the need for better factory debug procedures.

3.3.3 Region Two

I expected Region Two to be protective and insular, potentially uninterested, and resistant to the BP Team initiative. Instead, I found a well-informed, open, and receptive team. All levels supported the BP Team, but they were also strongly aware of the cultural history of their own Region Two, acknowledging and speaking openly about the justified nickname “Fortress [Region Two]”. They explained that cultural rigidity remains a problem although progress is being made by challenging traditional thinking and introducing new management into the organization.

The Senior Management group and Management group in Region Two expressed concern over workforce attrition caused by conflicting priorities and unclear regional objectives. They also discussed initiatives underway in the region that could potentially support or enhance the BP Team initiatives.

Region Two suggested that more face-to-face contact between Headquarters and regional staff would help build trust and cement positive relationships. One person in Region Two stated *“I have spoken to [name] at [location] several times, they have never been less than helpful, yet because I do not know them well, I wonder what they say about me behind my back...more time in the same room would really help.”* Also, to facilitate better information flow, several people in Region Two suggested headquarters should ensure information is sent directly to the appropriate person.

The most frequently identified issue appeared to be regional participation. The regions are interested in improving their interactions with Headquarters. Regions also wrestle with establishing clear priorities that do not conflict with one another. The issue of unclear priorities is more pronounced as distance increases.

3.4 ANALYSIS SUMMARY

This three-dimensional environmental scan reveals a more complete picture that may be useful to the BP Team. The scan uncovers several local versus global issues that are important considerations that may have been otherwise obscured. Exhibit 3-2, an enhancement of Exhibit 3-1, illustrates the major themes that have emerged.

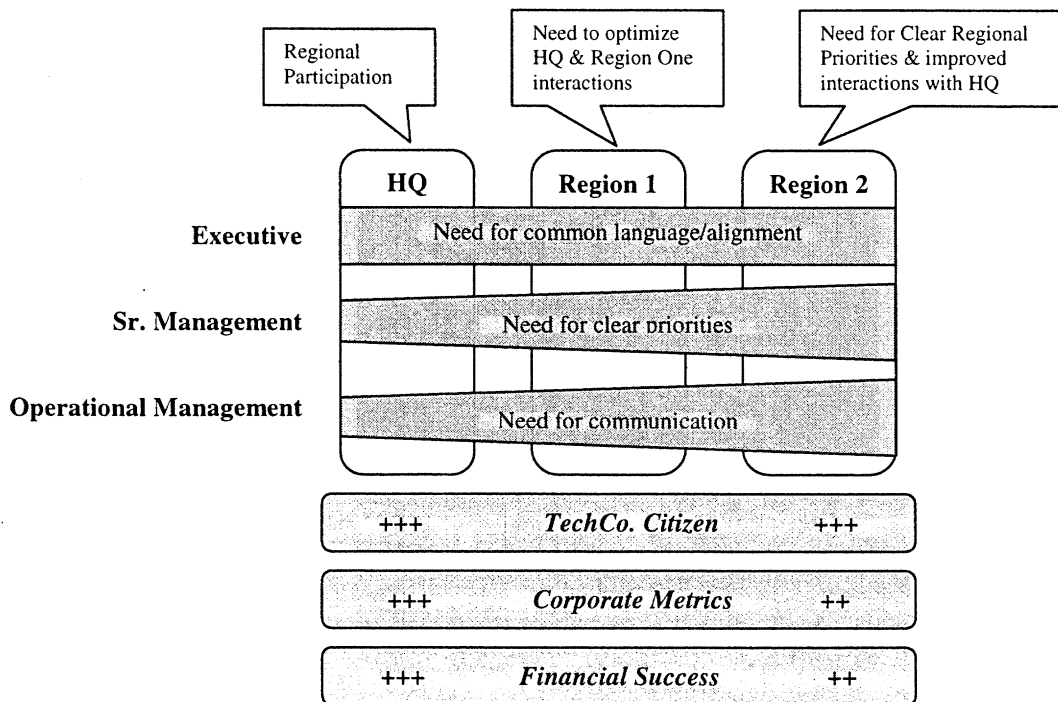


Exhibit 3-2. Emerging themes in each segment

Notes: Comment boxes above each region identify key regional themes. At the Group level, the gray bars capture priorities across cultural groups. Bars that increase in width represent a growing concern geographically. At the Foundation level, the “+” symbols indicate the relative strength of the theme geographically.

3.5 INTERPRETATION

At the Foundation level several people in Region Two said they felt less financially successful than Region One, and with Headquarters making it somewhat more difficult to ask questions, this sentiment was reflected in a slightly reduced financial rating. The regions indicated that corporate metrics at the factory level are less consistent than at the corporate level because of operational and cultural differences. The intensity of the comments increased with distance, resulting in a slightly lower Metrics rating. The TechCo. Citizen concept is strong across the organization.

At the Group level, more attention is needed from executives to communicate in a common language that will create a greater sense of alignment. Consequently, the Senior Management group seeks clearer priorities. The need for clear priorities increases with geographic distance. The Operational Management group seeks more interaction with the Senior Management and Executive groups. The need also increases with geographic distance.

At the Regional level, Headquarters appeared most concerned with regional participation, while the regions were most concerned about improving their relationships with Headquarters and with having clear priorities.

Quality people are clearly one of TechCo.'s greatest strengths. Historically, the inclusive, action-oriented management style built on a clear sense of purpose from the Executive group, has built a culture of high trust. However, speed-focused metrics that emphasize rapid growth appear to be eroding trust and alignment, leaving some staff wanting clearer management communication and a better understanding of their purpose.

Although most of these problem areas are minor when compared with many organizations, a more complete picture of local and global issues may help BP Team create a

clear purpose, alignment, and links within the organization. Chapter Four, with its recommendations and conclusion offers some ideas and suggestions.

Chapter Four

Recommendations and Conclusion

As with many new teams, BP Team is in a familiar position. The executive sponsor conceived the idea of a global best practices team, sold the concept at the steering committee level, then delegated implementation to a Senior Manager. The Senior Manager prepared and circulated documents outlining the team goals and startup schedule. Some team members have been recruited, including a team leader. The challenge is how to move forward with optimum efficiency.

In a more general sense, globally dispersed teams have the added challenges of dealing with the same issues that co-located teams must resolve – not only locally but also within each region. Priorities, politics, culture, trust, alignment, technology, and other factors all become magnified and multi-dimensional. The further the geographic distance from headquarters, the more difficult it is for the team to identify issues before they become a problem.

Traditional teams might have the luxury of avoiding these issues by erecting psychological or organizational walls and ignoring the problems. On the other hand, virtual teams cannot afford to do this as the various team members must pay attention because of their geographical proximity to the issues and their reporting relationships and strong connections to the specific region.

In the case of BP Team, the analysis only considered Headquarters and two regions, but it foreshadows the potential for disruption in the other three geographic regions and the possible consequences if the issues are not addressed.

Most research on global teams agrees that ultimate success is as much art as science. It is a balancing act of thinking externally to include the concepts of the multi-group team net, as Ancona (2000) illustrates, taking into consideration the unique esoteric aspects of a

virtual team, as discussed by Kostner (1995), and at the same time sticking to the team basics emphasized by Lipnack and Stamps (1997). Blending these types of frameworks in practical application to meet the specific circumstances of the situation can be incredibly challenging.

This chapter synthesizes academic and practitioner literature with the writer's own experience to offer recommendations that could optimize the startup of a globally dispersed team. Although most of the recommendations will be relevant to BP Team and TechCo., the intention is to offer suggestions that are more generic and applicable to most globally dispersed teams in a similar situation.

The recommendations start with an overview of three additional guiding frameworks, followed by tactics for implementing all four frameworks. Here, the intention is not to offer a "cookbook" approach but rather to provide a set of tools that can be used or modified to meet the unique requirements of a specific team situation.

4.1 GUIDING FRAMEWORKS

The initial stage of team formation is an extremely demanding period, with many activities requiring simultaneous attention. Thinking in a framework enables the team leader and other stakeholders to find patterns in the activities and make decisions based on aggregate information rather than getting caught in the trenches of the latest local or regional issue. Using frameworks, such as the one I have developed in Chapter Three, can be helpful in avoiding problems later.

Three additional frameworks are offered here that are helpful to understanding the roles of (1) the team leader, (2) an executive team, and (3) an effective team.

4.1.1 Team Leader Framework

The position of Team Leader is generally an incredibly demanding position during team startup. Ancona (2000) in her work on Net Teams, suggests nine leadership responsibilities for the virtual team leader

TEAM LEADER FRAMEWORK

• Articulates key team strategy
• Negotiates and advocates for strategy with executives
• Develops and embeds team identity
• Manages and crosses boundaries
• Maintains a large and diverse set of external ties
• Creates and manages the core, operational, and net layers
• Creates processes to effectively move members across layers
• Appropriately shifts from internal to external focus
• Sets up ambassadorial and task-coordination activities

Although many items on Ancona's list apply to all teams, added emphasis is placed on the responsibility of leadership in a team to work both internally and externally while managing movement across boundaries.

Duarte (1999) offers a complementary ten point model that helps guide how the global team leader might handle his/her responsibilities.

IMPLEMENTING THE TEAM LEADER FRAMEWORK

Get on the balcony	It is important that the leader does not get stuck in the trenches dealing only with tactics.
Identify the adaptive challenge	The leader needs to talk with many people both within their normal communication circles and outside their comfort zones to develop a more complete view of the challenges.
Regulate distress	Determine the distress level of not only team members but also the other stakeholders. Suspend decisions and avoid finding quick fix solutions to remove distress. Spend time with people in face-to-face meetings developing relationships.
Maintain disciplined attention	The leader should stay focused on the key issues, continually asking questions to gain clarity. Maintain a sense of urgency through focused communication strategies and use technology to keep work aligned.
Rely on distributed intelligence	Leverage team and stakeholder knowledge by getting everyone to talk about their thoughts and findings dynamically, even if opinions or ideas are not fully formed. Be systematic and ask all stakeholders, do not concentrate only on the most vocal.
Encourage leadership by all members	The leader should strive to identify leadership roles for new team members and stakeholders when possible. Letting leadership emerge close to the action may help increase accountabilities and vision with team members and the stakeholders.
Encourage robust communication	The leader should strive to over communicate and share both successes and failures.
Create a learning obligation	Making learning a team obligation will open communication, encourage everyone to discuss perspectives and problems both internally and externally. By looking at the learning patterns, the leader may gain additional helpful information.
Plan for action	The leader should include sponsors and other critical stakeholders in planning activities. This will increase ownership and participation. It is also important that each goal have at least one result, key meetings, decisions and milestones are identified and clear.
Team Handbook	The handbook serves as a common reference point for all team members and helps to create a team identity. It should include the purpose and plan, team directory, calendar and communication journal.

Clearly the team leadership role is vital, especially in the initial stages of team formation. It is not only important what they do, but also how they complete their key responsibilities.

4.1.2 Executive Team Framework

The executive team is key to any team but particularly important to a globally dispersed team. BP Team's situation emphasizes this importance because the Black Belt and Global Remote positions have dotted-line reporting relationships back to the regions. The executive team includes regional vice presidents who set the agenda and priorities at each site. The team leader should consider working with the executive sponsor to develop a common understanding of executive team responsibilities in order to avoid confusion later. Grenier and Metes (1995) offer the following list of executive responsibilities as they relate to virtual teams:

EXECUTIVE TEAM FRAMEWORK

• Leading and sustaining continuous visioning
• Building and sustaining relationships within and outside the organization
• Providing resources
• Leading the adoption of electronic information, virtual processes, and technologies
• Leading by example: setting the tone for virtual operations through action
• Championing the transition to virtual operations

Implementation points for this framework are not provided because specific steps relating to the Executive are beyond a team's span of control. The team leader and executive sponsor should augment this list to meet the specific needs of the team.

In BP Team's situation, unclear priorities are causing problems within other cultural groups. This may be a responsibility that can be added to the framework.

4.1.3 Team Framework

Any team leader needs to have a plan when a forming team. This is particularly important for globally dispersed teams because distance makes it more difficult to retrace

steps and increases the likelihood of incorrect assumptions and missing information.

Lipnack and Stamps (1997) offer a simple four-part framework for building a virtual team.

TEAM FRAMEWORK

Create an Identity.	The team needs not only a name but symbols that bring them together as a group.
Statement of Purpose.	The team needs to know why they are doing the work and what value it will add to them as individuals and the organization at large.
Determine overall results.	Teams need to have a clear sense of what the completed result will look like, what they are going to do.
Delivery date.	It is important to have a shared understanding when the milestones need to be delivered. Early deliverables enable the team to demonstrate success and build confidence helping to create swift trust and cement team identity.

Haywood (1998) also indicates several key factors for distributed team success. Written goals, objectives, and project specifications create a common reference point that can help guide discussions and keep everyone focused and deliverable evolve. Managers and team members need to have above average estimation capabilities therefore specialized training may be appropriate. A corporate memory system is essential to retain knowledge such as, project repositories, document control, source control or groupware. Performance metrics are key in creating corporate, group and individual alignment.

Duarte (1999) builds on Haywood's work offering a six-step process in starting a virtual team. Although the leader needs to have good team concepts, they also must have a plan of attack.

IMPLEMENTING THE TEAM FRAMEWORK

Identify team sponsors, stakeholders, and champions.	It is important that the global team leader also thinks beyond their immediate geographic domain and looks across and within the various cultural groups.
Develop a team charter that includes the team's purpose, mission and goals.	In my experience this needs to be an iterative process. The sponsor and team leader need to create an initial set of goals, but it is key the team is involved once selected to heighten their sense of ownership.
Select team members.	Once the initial key members are selected, it may make sense to use the skeleton team to participate in identifying potential candidates.
Contact team members.	The contact process should include face-to-face contact as early as possible. The person should understand why they were selected and time allowed for the leader and team member to communicate their perspectives on why the effort is important to one another.
Conduct a team orientation session.	This would include topics like, initial orientation to the task, discussion of team norms, deciding what technology will be used, developing an initial communication plan and team building exercises.
Develop team processes.	The team needs to decide on its key processes to create a basic context for doing business.

4.2 TACTICS FOR SUPPORTING THE FRAMEWORKS

Although the frameworks apply to co-located teams, their purpose with virtual teams is different. The underlying objective is to provide structure and support to bridge time and distance. This is especially important in maintaining focus, enhancing clarity and building momentum.

Several tactics, discussed below, are necessary for supporting these frameworks.

4.2.1 Publish a Plan

A central focus of Ancona's work suggests that the leader of a virtual team needs to balance his/her efforts by working externally and internally. TechCo. is fortunate to have a strong management team and a generally healthy cultural foundation which makes this

activity somewhat easier. However, employees have indicated they want clear priorities, smooth working relationships, and more management contact. By publishing and frequently revising a plan, the team leader creates a common reference point for all stakeholders. It becomes a tangible working document that creates context for discussion.

4.2.2 Leverage the Foundation

The environmental scan framework is useful for identifying the cultural norms that hold the organization together. Where these norms are strong, it is important to leverage them so they form a common reference point. In TechCo.'s case the TechCo. Citizen concept, corporate metrics, and financial success created a history and common language that is meaningful to everyone. In places where aspects of the foundation are weaker, perhaps in the case of personal metrics in a region, the new team can make more efforts to create clarity of the team's objectives and for the team members themselves.

4.2.3 Conduct a Stakeholder Commitment Check

The stakeholder commitment check was developed by Senge (1990) and adapted by Henry and Hartzler (1998) for identifying and building support from those individuals key to the project. The key is to identify the present perceived and desired levels of commitment from the various stakeholders. This builds on the environmental scan information and helps the team channel their efforts to garner further support. This is particularly important in a globally dispersed work environment where face-to-face contact is minimal.

4.2.4 Drive for Clarity at the Top

Clear messages from the Executive group are key to organizational alignment. TechCo. exemplifies this concept by historically providing bold messages that employees could rally behind. However, organizational churn and an evolving business environment, combined with burgeoning competitive forces, demand increasingly clear and frequent executive communication. The challenge is what to do when clarity does not exist.

A member of the current globally dispersed research team offered a five-point communication model that he was taught several years earlier. The Spectrum of Conversation model (Stata, 1995) includes five components that bring structure to discussions in which a group is trying to achieve a common understanding. The five components are:

- Relatedness – what does the group hope to achieve
- Possibility – what is the potential prize
- Opportunity – what is realistically attainable
- Action – what needs to happen to realize the opportunity
- Completion – what does ‘finished’ or complete look like

A facilitator leads the group through discussion of the five components. As Kostner (1996) indicates, every member of the team needs to be able to visualize, communicate, and commit to paper a clear picture of what the anticipated result looks like so that the image is preserved over time and distance. The output of the workshop should be a clear set of priorities that the Executive team should communicate using the language developed in the Spectrum of Conversation workshop.

4.2.5 Capture and Plan for Concerns

The environmental scan and stakeholder commitment check help to identify areas of concern at various levels. It is important that these concerns are captured and integrated into the plan. This builds trust and make strides toward acknowledging and removing roadblocks. Also, people may be more willing to cooperate with team initiatives if they know their concerns are being resolved.

4.2.6 Acknowledge Cultural Differences

Teams working across several continents should acknowledge, understand, and respond to the cultural differences of various team members. Henry and Hartzler (1997) suggest a cross-cultural introductions workshop as a way to get to know team members and stakeholders better and prevent misunderstandings and conflict later. The approach involves preparing questions that are relevant to the team and the current situation, and then each person answers the questions one at a time. The information is gathered on a worksheet.

Sample questions include:

- “What are your expectations in the area of time frames? Do people in your culture believe that deadlines are requirements, options, or moving targets? Do you usually think in terms of the very long-term, or more immediate short-term goals?”
- “Would you describe yourself as more action oriented, or thoughtful and reflective?”
- “How is it best to communicate to you? Written, verbal, other?”
- “Are suggestions viewed as calls for actions, food for thought, or directives?”
- “Do you find the people in your culture to be competitive? Or do they avoid competition? Is competition considered rude?”
- “Do you generally follow a hierarchical structure? Do you prefer to ‘go through the channels’? Or do you prefer to work with whomever you believe you need to in order to get the work accomplished?”

These questions are examples that could be considered, and Henry and Hartzler (1997) offer several additional questions that might stimulate further ideas. Questions should be designed to explore the areas of:

- Time
- Action
- Preferred communication method
- Power
- Individual vs. collective
- Hierarchy
- Formality
- Suggestions

The workshop can end with team members summarizing what they heard that was most important to them, where they felt complete agreement, where they recognized strong differences, and what the team should do about those differences.

Several people interviewed spoke about the cultural differences within regions and countries. Exercises like the In-Depth Cross-Cultural Introduction Workshop help identify those differences, focus on people rather than tasks, and make communication more conscious and purposeful while at the same time building trust.

4.2.7 Build Trust Within the Team

Time and distance in the virtual team environment make trust extremely important. Bringing a new global team together for a face-to-face startup session gives everyone an opportunity to know the others, build friendships, develop bonds, share stories, experiences, goals, and aspirations. It is the start of relationship building and begins to grow into trust.

Within the first two meetings the team should clearly establish goals and objectives, and work together to develop a preliminary plan. This action gets everyone on the same page and creates a common language. It is important that everyone can use the productivity tools to store and access the plan. It is also important to create written operating agreements where all team members have input and feel part of the creation process. Although it may seem more efficient to have the team leader draft the operating agreements, they will probably be less effective because the team will not feel ownership of them. The agreements should cover everything, from topics to be discussed to keeping the plan current, including how to handle breaking the agreements and how conflicts will be managed.

Trust comes from performance. It's trust that springs from competence. If I see this person is going to do a first-rate job with the information I provide, that he won't undercut it, won't embarrass me, then I'm more likely to trust him. (Geber, 1995)

It is important that the team leader hold the team accountable for competent performance and not tolerate less. Still, it is also important that leaders make time for personal contact with staff, whether at coffee stations, via telephone calls, or in a supportive e-mail. The contact should also include time to "create fun, celebrate progress and successes, and show personality" (Henry and Hartzler, 1997). At the same time, once the team is up and running, communication with management and stakeholders must remain a priority. If stakeholders lose sight of the team once it gets underway, it may be difficult to regain management attention and ongoing sponsorship.

4.2.8 Develop a Communications Strategy

Ancona (2000) indicates teams that are seen as most universally effective focus communication upward to the sponsors, to the extended team, and to the core team. Ancona and Lipnack and Stamps (1997) stress the importance of communication plans that are both externally and internally focused. Another key part of communication is how well the group leader transitions new members into the group and exiting members out of the group.

To bring together a communication strategy, the team leader should consider building a communication framework. First, identify members of the core, extended, and net teams, then all other stakeholders. The leader should determine what type of information each person or group needs and how often it is needed. It is important that the various participants have an opportunity to become involved in determining the communication matrix so they have a sense of involvement and ownership. Lastly, they should determine what communication medium will best convey the specific message. The matrix can be updated as the participants change and it serves as an effective guide to communicating more evenly and completely.

The team leader should have regular individual face-to-face meetings with external and internal stakeholders and team members. Team norms need to identify which meetings are required and which are discretionary. Protocols should be established for audio and videoconference meetings to ensure everyone has the necessary information in advance. Where face-to-face meetings are not possible, the telephone is more personal than e-mail. E-mail should be used for routine information sharing, kept brief and not used to announce organizational or group changes or to deal with conflicts. All staff should hear important information from their supervisor at the same time.

Senge (1990) advocates a check-in procedure with groups to allow each person to talk at the beginning of the meeting to communicate whatever is on his/her mind. The group listens without responding, giving each person the opportunity to talk without interruption. The group then takes a few minutes to talk in general about what was said. It is a powerful technique to focus everyone's attention in the room. The check-in process may be useful to teams in fast-paced organizations like TechCo. which focus on immediate issues.

4.2.9 Clarify Metrics

Although performance builds trust, measuring performance is equally important. The team leader should make it a priority to ensure that everyone understands the team as well as individual metrics. Further, all metrics should be calculated similarly across regions including Headquarters. The team should work globally to ensure that the metrics are calculated fairly, acknowledging regional differences, and that calculation adjustments are understood by all concerned.

4.3 CONCLUSION

Building any team is as much art as science. For a globally dispersed team, time and distance increase the complexity and challenges. In the team startup phase it is particularly important that the team leader and new team members try to think in frameworks and pay special attention to key events. This will help avoid chasing the most burning tactical challenge and should improve alignment.

The thesis has developed a new flexible environmental scan framework to help identify foundation, group, and regional issues. Any new global team can use this framework -- and any of the others provided -- to better position itself for success.

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