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Collaboration as a New Requisite for Managers

Influencing and Structuring the Thinking of Dispersed Teams

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This paper details a number of practices managers can use to build an effective dispersed work group. It suggests that although collaborative technology will help, the real issue is structuring the group's collaborative thinking, so that involvement and focus can be maintained across boundaries of function, geography and competing demands.

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Working with dispersed teams creates new challenges for today's managers. In the matrixed work world, teams form and dissolve based on needs and resources that cross many boundaries. Leading such a team means effectively using influence and collaboration.

Managers regularly become responsible for the work of teams made up of members from multiple functions, such as marketing, design and distribution. Such a team may have some members in Dallas, Tucson, San Jose and Singapore. These members comprise various cultures of origin, and more importantly come from quite different work cultures based on their departments' values and points of view. That is, the sales organization has expectations of behavior that make it quite different to deal with than the engineering organization. A dispersed team's manager therefore needs to take into account many types of boundary issues, in addition to the probability that these workers have other responsibilities and loyalties which must be balanced against this team's needs.

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Further issues that impact new managerial skills include assessing and communicating with a wider variety of stakeholders, from customers to associated business units to other teams on which this team depends for work elements. Everyone has too little time, wants to contribute and go on with the rest of their work, and has little patience with the logistics of having information provided to them on demand.

Technology has provided us with a number of knowledge sharing and decision support tools. These, of course, must also be managed by our harried team supervisor. Decisions about standardizing tools and protocols for their use add to the burden of attention. Yet sharing tools isn't enough. It is really the skill of influence - brought to bear on the issues of collaboration across boundaries - that calls for attention in this paper.

An effective leader of a dispersed, matrixed team must manage by influence. S/he must manage across a spectrum of variables that were not so critical to a manager in the old world of department steward. The new variables change over the short life of a team and are magnified by the cross-functional and temporary nature of the enterprise. These variables include expectations, attention, operating agreements, information sharing protocols, course correction, and task inter-dependencies.

One can argue that the first and last of these are classic and timeless manager responsibilities. Yet they take on exponentially larger import, given the dispersed factors discussed earlier.

Practices

In this paper, I suggest that following a set of best practices will enhance effectiveness in the cross-boundary arena. These practices include:

- *Clarity of purpose*
- *Maintaining involvement*
- *Team focus on outcomes*
- *Identifying and addressing dependencies.*

Again, I am not suggesting these have not been areas of manager skill in the past. I am asserting that they now form a new requisite, in that their absence will inevitably result in failure for a cross-boundary team. Their presence must be accomplished through managing collaboration.

Collaboration is important because these new teams are not usually structured as being the main activity for their members, or as having clear ownership. Therefore, the only way that effective work will continue past the honeymoon period is if members have a sense of ownership and commitment themselves. Ownership develops through interaction within the group, not from dictates from a power position. Then, decisions will stick, and follow through can be expected.

Clarity of Purpose

Teams need to have a clear and unified sense of what they are here to do. The manager responsible for convening a team can make sure there is opportunity to answer and digest these questions:

- *Why are we here?*
- *What is the best possible outcome from our work?*

The group should repeatedly answer these questions and should continually re-check to make sure that everyone is on board with the answers as the team develops. That is, checking that there is both. Shared understanding of purpose, and Agreement on what the outcomes should be.

This is different from someone stating the answers; it means common expectations and integration of differences in perspective. In our experience, it pays to re-check this regularly, and in fact, to establish at every meeting what the smaller purpose of each meeting is, in the same way the overall purpose is established at the beginning. A dispersed group needs to 'focus the lens' each time it begins another piece of work.

A three-day online project meeting began with a mission statement, but without a shared sense of what really needs to happen today. The group clarified this through some conversation. Starting day two, two members stated a clear outcome (both project and next task) and asked for re-calibration from anyone with differing understanding. Doing this clarified what was on-topic and what should be avoided. As we got to the end of day three, a member set up a quick survey which included two scaled questions (did we nail it? and a confidence check on the customer's imagined response) and an open-ended question on what would make it better next time. The results helped us build in some follow up and some fine-tuning.

Maintaining Involvement

Several factors can contribute to team members' willingness to maintain active participation in a dispersed project.

- *Opportunities for input*
- *Protection/clarity of commitments*
- *Sharing various roles on the team*
- *Maintaining and checking for course correction.*

Input When there is also a way to focus through converging this input - using voting or survey tools - then the team can see opinion and priorities in a context. This greatly helps alignment with a direction.

Commitment A wise manager will enable the stating of commitments, both for accountability and for boundary setting. By ensuring that members are making agreements that are both clear and reasonable, a manager can build in better longevity and success for the team. Members will have competing demands on their time and resources. If their tasks are clearly delimited, they will be more able to follow through without concern for burn out or scope creep.

Shared Roles A variety of tasks helps to move the work of a dispersed team along. When these are shared among members (meaning distributed and rotated), there is a better chance of actually getting work done together. These roles usually include:

- *Who is leading any given step*
- *Mapping the process and the system environment*
- *Monitoring and updating the steps in the project*
- *Communicating amongst members and stakeholders.*

Course Correction As the team moves along in its task cycle, there is need to check for effectiveness and focus of direction. Are we doing what the customer really wants? Have the requirements from our sister team changed as of Quarter 2? Are we going down a rat-hole with this issue? By providing opportunities for checking and correcting the course, a manager can build in efficiency and alignment. It helps to know if the emperor has no clothes on; and usually the view of this from six sets of eyes is better than one.

Our product team had been working for two months on the plan for a major new integrated product, involving three separate business units. One BU raised the issue that their new fiscal-year plan would now require a higher capacity for their part of the integrated product. This had major impact on my group's use of common resources. Rather than throwing the team into disarray, the product leader asked everyone to go online and list issues brought up by this change. Then she had the group prioritize these new problems, and add solution ideas and dependencies to the top three barriers we identified. After that, the team was able to have a productive and non-blaming negotiation to help us shift our direction and keep going.

Focus on Outcomes

Even more so than in 'regular' meetings, it is imperative to maintain a line-of-sight connection to the desired outcome of a dispersed team project. When members are working neither regularly nor together, the skill of 'use the zoom lens' to plan backward from your desired results is critical. Several factors can help this.

- *Build a clear picture of success. Fine-tune your goal statements.*
- *If the team is able to provide input that is both divergent and convergent, there is opportunity for maximizing both creativity and clarity of action.*
- *A central, updated list of deliverables, where everyone has opportunity to input and comment on dependencies, reduces confusion and time lags.*
- *Set tools to automatically notify the team when there is a change. This keeps everyone engaged, and motivates continued progress.*
- *Set up team agreements for turn-around times on responses to email and phone requests. Also, set up agreements on giving/receiving direct feedback, since this is an important issue across cultures; develop a shared expectation for addressing disagreements or holes in thinking.*

Structuring Group Thinking In the practices discussed above, the manager's role is one of influencing rather than directing. In the online world, this means two things in addition to personal communication skills. It means creating a structure that requires effective input; it means taking time to gather and check for wide-ranging thinking - getting the divergent point of view out on the table.

In applying influence to group collaboration online, the facilitative manager will build in steps to check that everyone has come to the same point: sharing understanding or sharing confidence in a decision. In a meeting room, this might have been a verbal check with raised eyebrows, waiting for nodding heads, and reading body language to make sure that the agreement is not just 'going along'. When this check is online, the process must become more frequent and more explicit. Therefore, the manager must provide a method for collecting and summarizing group intent and confidence.

Clarifying Decisions This leads us to a review of enhancements to decision processes. Here are a few suggested actions that can help build a sense of effective shared work within a dispersed team:

- *Develop shared group priorities*
- *Set clear steps for sign-off*
- *Solicit stakeholder feedback*
- *Double-check definitions.*

Priorities When the group prioritizes a list of needs, the outcome of this is shared priorities. These may change, of course, but they represent the group mind's assessment of where the critical attention needs to go now. Even if I voted for an issue that came out lower on the list, I can easily buy into the concerns, when I have been a significant part of creating the list of priorities.

Our customer support group brainstormed a list of issues affecting the provision of great customer service. We dumped these into a voting tool where we could assign multiple checks to *the issues we felt were most important. We quickly turned a list of fifty issues into six key actions. Even when my pet peeve came out as number six, I saw why the others on my team are soconcerned with some other big problems. We'll create a list of actions for each of these themes, and I really think focusing in on these will give us a different level of service!*

Steps Similarly, when the team members participate in building the steps needed to reach the shared goal, and work on refining and clarifying these, there is a much stronger chance that:

- *These steps will be followed through, because they are shared, visible and explicit;*
- *The process will work, because the steps are detailed in relation to each other and to the whole project.*

Stakeholders Maintaining a relationship to other stakeholders (who are not a regular part of the team) is an easy step to leave out, particularly when the team and its work are not primary focus for the members.

Definitions When decisions are made, we have found it very helpful to double-check them for shared understanding of the criteria being used - the definitions of the issues on the table, the way in which different members may be viewing a particular issue.

Our team decided to 'involve the customer in the design process'. When we checked, we found out that some of us were thinking that meant the customer reviewing the alpha version after we had it prototyped; some others assumed that meant having them sit in on our twice-weekly design conference calls as a partner. Another thought it meant surveying for requirements before we began the next version of the design. We listed our various definitions so we could see them all together, and discussed the themes that emerged. We actually got both clearer and more creative in how we would build in customer input. And we invited the marketing and account groups to look at our work online, so they would understand the context for our initiative.

Once the shared definition is more specific (and some of the elements above are refined out) the decision and its consequences may shift, and will certainly be clearer in its effect on our work. It will also bring us closer to understanding each other and how to how the group thinks together.

Workflow and Dependencies

Once having established a good groundwork for shared teamwork, the manager can set up steps to ensure that the team can identify its role in the particular 'supply chain' that its project sits within, and that members can point out and add critical dependencies that will affect its functioning smoothly. In the same way that clarifying definitions brings issues into focus, the team helps each member's work by specifying what the critical dependencies are and how those factors interrelate to team tasks. There are elements to this of course correction, creative problem solving and smoothing internal handoffs. When the group can visualize the flow of process steps and potential concerns, it becomes easier to head off barriers or prepare other stakeholders for their part in the process.

Using *online tools* to make lists helps the team maintain a coherent vision of these requirements, group milestones, and links to others' actions. Many teams use some version of central dashboard, with one member responsible for updating each line item's status. In our work, these items should have links for drilling down to more detail, or to discussions for resolving barriers.

Such a dashboard overview helps to maintain sponsorship from upper management or key customers and gives everyone a way to connect to the progress of the mission.

A dispersed design team started with a clear outcome seven months in the future. They built backwards to mark major milestones that would need to happen to get to the outcome. These were set up as rows in an online project list, with sections for task, owner, dates, status, and dependencies. Everyone then contributed to fleshing out this picture of the main steps, adding a few more in the process. Major steps linked to additional lists, where smaller teams could replicate action steps in more detail, linking individual steps to online discussions in order to analyze barriers, resources and priorities. The team can see where the bottlenecks occur, and it has a way to log changes and make comments.

Metrics Using either change in state measures or direct feedback from customers can really help to raise the urgency on a project. In our view, it remains important to build these measures with input from the team and outside stakeholders, and to balance the metrics (and hence the results) between pure output, customer satisfaction, and the learning capability of the enterprise.

This is because we want to *do well* at doing well. That is, we need to have our organization learn to do this job better the next time, and transfer what worked to other teams facing similar issues. When the team participates in and updates the measuring of its performance, focus and course correction are more likely to occur.

Information Transfer A critical productivity issue for matrix organizations is making it easier to cross boundaries, and making it easy to find co-developed information later. We want to harvest the ideas our customers have so we meet their needs, and so they feel they are included in our collaboration. We want other teams to start from where we left off, not from step one all over again.

For learning support and for ease of use, it helps to maintain a central archive of documents, discussions, practices and measures. Using this archive of knowledge regularly, and making it a general practice to deposit documents and notes there, the team can point other teams to this as a resource.

Summary

I have discussed practices that help a dispersed team get work done effectively. We've looked at a number of steps and checks that managers should structure to help the team. Yet, the purpose of this paper is to assert that these steps are effective only as a collaborative effort. The manager can only create opportunities for buy-in and focus, s/he cannot legislate these. Nor can the manager afford to 'run around' checking on and encouraging team members who may be all over the globe.

The point is that the structure of the team interactions must be set up to enable effective functioning. This requires clear thinking by the manager, and repeatedly asking the right questions to involve the group. It means getting the team itself to collaborate on clarity of purpose, maintaining involvement, focusing on outcomes, and identifying inter-dependencies.

By practicing these new skills of influencing and sharing structured thinking, the manager of a cross-boundary team can help a team to develop effective online work habits. These practices become requirements as we move further into sharing work with people from many functions and locations.

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