WORKING VIRTUALLY

Transforming the Mobile Workplace

SECOND EDITION

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Foreword by Didier Elzinga

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The Network Is the New Workplace

"There is no end to education. It is not that you read a book, pass an examination, and finish with education. The whole of life, from the moment you are born to the moment you die, is a process of learning."

—Jiddu Krishnamurti

Work—and How We Are Compensated for It—Is Changing

Work is a collection of activities we undertake to add value to an enterprise or community for which we are compensated. *But we're just not working in the same old way.*

Smart technology applied to enterprise solutions has changed the way we work and manage. It has also impacted the traditional employee contract. Though the U.S. tax code and much of our societal mind-set haven't changed as quickly, much of the U.S. workforce is already doing transactional work that is provided by contract workers—freelancers, contract employees, consultants. U.S. political rhetoric speaks of job creation with little understanding that many U.S. workers (forecast to be half by 2020) are working independently and often virtually.[1]

The nature of the employment contract has a direct impact on how virtual teams are managed and led. Virtual leaders are managing alliances more than controlling work or managing individuals.[2] Organizations with flex-work options attract a more agile workforce from a bigger talent pool.

This book applies best practices to working virtually in the context of this changing workplace landscape. More of us are collaborators with portable skills. We see ourselves as companies of one, navigating our own career path, no longer following one laid out for us by our employer. In 1989, Charles Handy wrote about the emergence of *portfolio workers*—individuals who reject the notion of a single, permanent job. Today's millennial workers think as portfolio workers. In 1997, Daniel Pink started the Free Agent Nation when he became an independent contractor himself.[3] Flexible work options and telework are no longer an emerging trend. We've surpassed the tipping point, and they have become normal.

This book provides a clear road map to navigate today's work realities while producing team results and working virtually. *This book is for the executive* who focuses on integrating networks of teams, working with information services to set up real-time information networks, connecting more and controlling less, and adapting performance management processes to be more team driven and technology leveraged. For those just beginning, *Working Virtually* has practical advice for leading changes in an enterprise that is preparing for virtual work.

You're reading this book because you want to learn more about virtual work. Maybe you're looking for a permanent job offer or promotion. Maybe you are like a lot of us, a little collaboration technology intimidated and afraid to look dumb. Maybe it's simply a way of remaining employable. Or like the traditional reader of the first edition, perhaps you work or manage virtually.

This book is for the professional who works from an office, a home, or a hotel. You need to know about the process of getting your enterprise, your teams, and yourself enabled for virtual collaboration. This is not a technology how-to book, though you will learn something more important—the principles and guidelines to select and use tools well.

This book is written to and for the virtual leader. It shows managers a clear path to develop, support, and lead high-performing virtual teams. *Working Virtually* provides an understanding of the context in which we all work, as well as the roles and responsibilities that go with a career in the mobile workplace.

Worker: Brings Talent to an Organization, Exchanging It for Money

Worker is a lowly term. *Work* isn't an exciting word. A Wikipedia search of "worker" redirects to "laborer."

Regardless of label, however, *we work for hire*. Therefore, for convenience as a reader of this book, *you are a worker.* I mean great respect. Workers bring their talent to work—often virtually. You are also a leader. Today's teams collaborate, and the best ones manage themselves. If you're a virtual worker, you are a coleader for bridging virtual distance, a responsibility that is seldom formally defined in the contract.

Virtual Workers

Most people think of virtual workers as telecommuters, but that is only one type. Eddie Caine, a nationally recognized and oft-quoted expert with more than 25 years' experience, defines *virtual workers* as not only teleworkers but also

- nontraditional workday extenders who work evenings and weekends,
- part-time or occasional teleworkers,
- job sharers, and
- remote employees from a satellite office or traveling employees.

Leaders work collaboratively with human resources, information technology/information services, and facilities departments to determine the equipment, real estate, and policy requirements for each type of worker. Office and digital network design warrants some systemic thought.

Network: The Vehicle *and* Platform of Work

We are in a relationship with technology. We are nodes on vast interlocking networks across work and home. We must navigate the changing work habitat *and our careers*. If you think of yourself (and your team) as connectors (or nodes), your value grows as you forge stronger ties with your professional networks—all enabled digitally.[4]

We can't talk about work without referring to the network. Work is built on networked technology platforms, even if team members are not working virtually. The leading dictionary definition of a *network* is a group of two or more computer systems linked together.[5] Networks in virtual organizations are *the structures we use to connect and communicate*.

Professional and social media networks are increasingly part of work life, too. They include *the people and groups with whom we stay connected*. These are purposeful relationships we develop face-to-face and online through social media, such as LinkedIn.[6]

The network has expanded to embrace the technical *and* human, and they are inseparable.

Professional relationships inside and beyond organization boundaries are essential to career success. Many service firms expect their people to develop a robust internal network, taking an active role in sourcing projects for themselves under the organization umbrella. More organizations are considering the value of a candidate's professional network in hiring decisions, *leveraging the node that is you*.

This Book Is for You If . . .

You are reading the right book if you work with, lead, or support teams who aren't always together at the same time. Human resource, information technology/information sciences (IT/IS), and facilities professionals will benefit from reading this book.

Executives will see their organization differently if they read this book. Organizations coordinate work through networks of teams, and any who read this book will see the power of a technology network built for relationships.

Team managers are the obvious audience and beneficiaries of *Working Virtually*, as are virtual team members. Everyone influences the team's success and, therefore, is a virtual team leader. Here are some of the key questions answered in this book:

- How will virtual teams affect the organization's culture? *Our* team's esprit de corps?
- How will I know people are working? How will my manager know I am working?
- How will I coach people and support a team I don't see?
- Can we trust each other?
- How will I get what I need and not feel isolated?
- Am I using the technology correctly and using all the capabilities my team needs?
- How will working virtually affect my career?

At the core of these questions is one answer: *Learn how to maintain strong, trusted relationships, digitally and in person.*

Everyone must build and nurture relationships across time and distance, even the traditional office employee. Understanding today's work realities helps map a strategy to thrive in today's mobile work world. *Working Virtually* provides a guidebook that works today. In reading, discover what works for you and your virtual team.

Why Working Virtually Now? Because It Matters

The way we connect has evolved since the first edition of this book was published at the turn of the twenty-first century. Virtual connection mattered then, but it was a limited set of options, usually blended with in-office team time. Virtual connection is easier now as technology has transformed. It matters even more since many teams are virtually full-time.

People Matter

Technology is an indispensable team enabler, but people are still the key. To adapt President Clinton's famous quote, "*It's about the people, stupid.*" Despite

the changing employer-employee contract and rapid increase in work auto-mation that eliminates some positions, *people are essential*. Many of us have looser ties to our employers, but we still want to do work that matters with people with whom we work well. In a virtual work world, team members need support, whether traditional employees or contracted experts. Everyone needs to be enabled to collaborate virtually and motivated to perform well. As this book will reveal, teams won't get that support without competent leadership. Many organization and virtual team leaders stifle productivity without knowing it. This book shows how to unleash talent, and how to do it virtually.

The Virtual Leader Matters

The virtual manager is *the key influencer* of work satisfaction and employee retention. The team leader is key to knowing how our work contributes, and that we are valued. The manager greatly influences how committed people will remain to the team and the organization. In a mobile work world, lead-ers must reexamine how to reward and lead through virtual influence, reach-ing out so people want to bring their intelligence and creativity to the team. Leaders who genuinely connect virtually with their people are, simply, better.

Technology Matters

Technology is a disrupter and an enabler; we are virtually mobile *and* organi-zationally connected. We must master relationships with people *and* tech-nology, using the network and collaborative tools to come together. Today's executives are rightly focused on redesigning organizations to be digitally integrated and network based—a network of teams.[7]

What You Will Be Able to Do After Reading This Book

Unleash your own and others' talent, clear obstacles, and collaborate with people face-to-face and virtually. Lead engaged virtual teams, whether you are a team member or manager. Learn to develop and nurture authentic, trusting relationships across the digital divide. The role of technology has grown dramatically since publication of the book in 2000, and it continues to drive the *way* we work and manage. Performance management is more auto-mated—for example, by leveraging task and project management tools. You'll learn when and where to use technology to manage people and to collaborate.

What has not and cannot be automated, however, is the team. When people come together as one, they hope to form a team that comes to think of itself as a dynamic force. Teams don't just coordinate intellect and skills. They open themselves to the potential of doing something together that none could do alone. The organization's integrated technology facilitates collaboration, *but the virtual leader and team members make it happen.*

Evolve your practices from what you learn in this book. Use and adapt technology and tools that support the *people part* of virtual teams—the uniqueness only you and your team can be.

Go to the book's information website (www.WorkingVirtually.org) and download additional tools and assessments to improve your virtual work and team, available free for book readers. Start building your tool kit.[8]

Included as a thank-you gift is a FREE BONUS CHAPTER: *Virtual Meeting Management.*

How to Navigate the Updated Edition of *Working Virtually*

I have curated workplace flexibility experts' experiences, sought client input, and interviewed all levels of the organization, exploring what has changed in the last two decades, not wanting to rely on just my own client work. This second edition incorporates shared wisdom into a road map for virtual mastery. This book travels a Threefold Path to team performance, as shown in Figure I.1. This edition also introduces the Fourth Path to a successful professional career. The team leader begins the team on the development path, launching or repositioning the virtual team to work together well. The support path begins while forming the team and continues throughout the life of the team, closing the distance that comes with virtual work. The outcomes path produces results that bring it all together for the team. Mission accomplished.

The book is laid out so you can go directly to the section or chapter you need most, though a front-to-back read is obviously what I hope you choose to do. Table 1.1 provides a quick reference of each part.

Part One speaks to how the workplace is mobile and the current state of flex work, telework, and virtualization. It also warns where to shift mind-sets to thrive in a mobile work world. It defines drivers and blocks to virtualizing their operations for collaborative work, including cost savings and effectiveness statistics.

Part Two assesses an organization's virtual effectiveness. You also have access to free downloadable resources, a virtual readiness assessment and

Figure I.1. The Threefold Path for high-performance teams.

MIND SHIFTS
- People, Not Place
- Network Is the Workplace
- It's All Part of the Job

EMPLOYEE ENGAGEMENT
- Interpersonal Caring
- Organizational Commitment

01

FIRST PATH

Create a Cohesive Team
Culture:
- Team Development
- Planning
- Structured Trust

02

SECOND PATH

Support the Team
Community:
- Maintenance
- Emotional Bandwidth
- Synergy
- Assistance

03

THIRD PATH

Produce Successful Outcomes:
- Celebration
- Quality Deliverables

The
**Threefold
Path**
for

High-Performance Teams

Change the Definition of *Work*   Follow the Threefold Path   Enjoy Strong Relationships

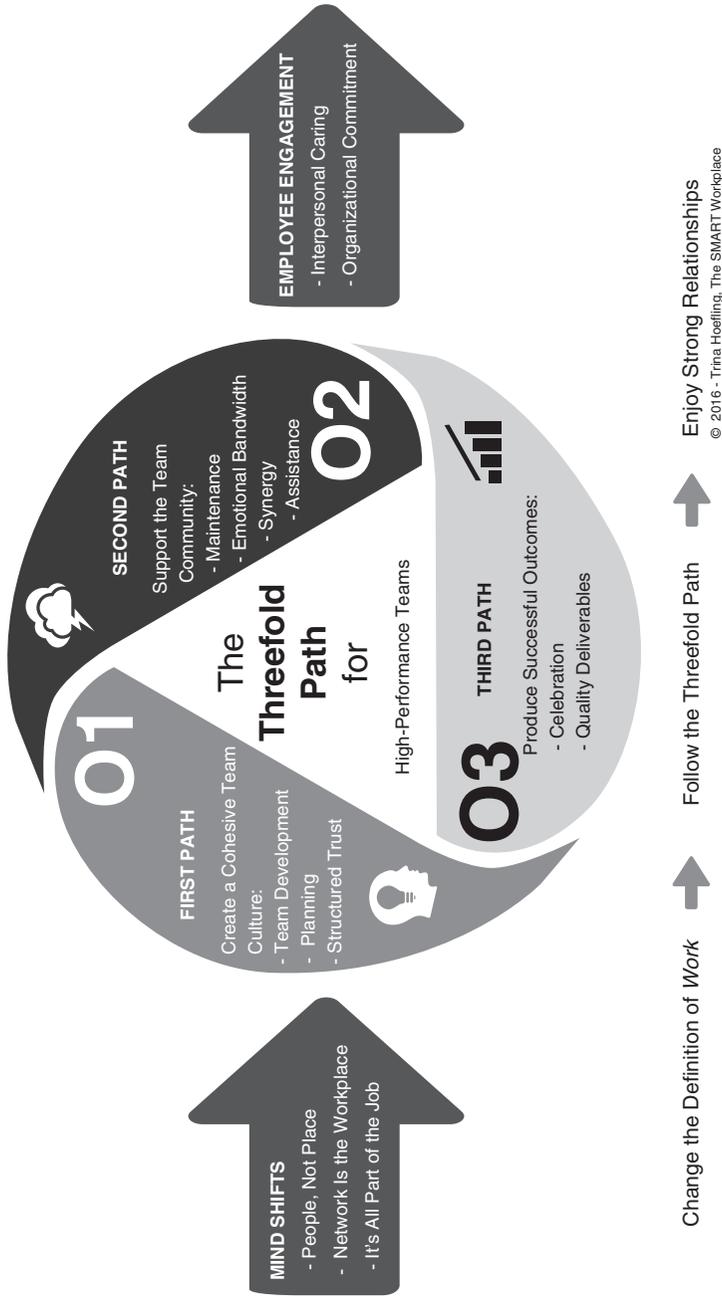© 2016 - Trina Hoefling, The SMART Workplace

TABLE I.1
Navigating the Book's Reading Path

Part One: Virtually Mobile, Organizationally Attached	Vital mind shifts, virtual drivers and blocks
Part Two: Will Virtual Work Here?	Redesign of the workplace systems and processes to leverage mobility
Part Three: Essential Virtual Competencies	Virtual team leader and member competencies, team qualities
Part Four: The Threefold Path of High-Performance Virtual Teams	Virtual team leader and member competencies; team qualities; and team development, support, and results management
Part Five: From Me to We	Technology, tools, and communication for collaborative teamwork
Part Six: Expand Emotional Bandwidth	Having relationships based on trust and generosity, engaging virtually, and navigating the fourth path to a successful career

sample opportunity profile matrix, so you have a point of comparison for your own organization.[9]

Part Three provides the information you need to be, hire, and develop competent team leaders and virtual professional team members. It discusses stages of development for new virtual workers and teams, and how the manager can respond. It lays out the Threefold Path for high-performance virtual teams.

Part Five steps through many pragmatics to build a virtual toolbox for the team. Communication and tool choices impact relationships and trust and team results.

Part Six focuses on the interpersonal dynamics that build trusting teams and expand the emotional bandwidth in relationships. We examine what it takes to have a virtually engaged workforce and set up professionals for lifelong career success. The book ends with a chapter on my thoughts about what's next.

Why Am I Your Pathfinder and Guide?

I've been at this for a while. I developed an early remote management training program in 1984, before telecommuting or virtual work had a name, in an effort to help engineers in a global corporation manage matrix-based project teams built on expertise, not geography.[10] They were separated by culture, continents, and language, but they were connected by a shared team mission. We didn't have a word for virtual team management then. I still

help individuals and organizations work together better after all these years, often virtually. I wrote *Working Virtually: Managing People and Organizations for Virtual Success*, first published at the turn of the century, while I was Telecommuting Success, Inc.'s vice president of training programs. I've continued to grow as I provide strategic organization transformation to organizations seeking to retain an engaged virtual workforce. At the same time, too little has changed when I work with people. Good people struggle to help people work together, especially virtually, prompting me to curate what I've learned. I sincerely hope my update is helpful for today's mobile workforce.

Notes

1. Dan Schwabel, "10 Workplace Trends You'll See in 2016," *Forbes*, November 1, 2015, www.forbes.com/forbes/welcome/#6bbe75a4456e1fe51497456e

2. Reid Hoffman, Ben Casnocha, and Chris Yeh, *The Alliance: Managing Talent in the Networked Age* (Boston: Harvard Business Review Press, 2014).

3. Daniel H. Pink, "Free Agent Nation," Fast Company, December 31, 1997, www.fastcompany.com/33851/free-agent-nation

4. "Node (computer science)," *Wikipedia*, last modified July 2015, https://en.wikipedia.org/wiki/Node_(computer_science)

5. "Network," *Webopedia*, www.webopedia.com/TERM/N/network.html

6. Trina Hoefling, "Making Your Net-Work," public workshops, 2006–2015, various locations.

7. Deloitte University Press, "Global Human Capital Trends 2016: The New Organization: Different by Design," https://forms.workday.com/us/landing_page/webinar_deloitte_global_hcm_trends_report_lp.php?camp=70180000001EaaM&campid=ussm_lip_c_hc_no_15.151

8. www.WorkingVirtually.org

9. Go to www.WorkingVirtually.org for additional resources and assessments. Download a free bonus chapter on how to manage virtual meetings!

10. Team managers in the U.S. Midwest were managing engineers in Japan.