



## LEADING FROM A DISTANCE

SKILLS FOR SUCCESS

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To participate efficiently in today's economy, leaders must be effective at managing technical and support teams whose members are scattered across many geographic boundaries.

This report presents research, best practices and case studies for successfully leading from a distance. The research reveals a core set of essential leadership skills that meet the needs of dispersed, "out of sight" people while achieving targeted results.

### **WHAT'S UNIQUE ABOUT LEADING FROM A DISTANCE?**

There are unique and distinctive requirements for leadership attention in virtual project team or remote management situations, where individuals who share responsibilities for common goals reside in geographically dispersed locations.

Key findings from both research and best practices across many industries reveal that effective leadership from a distance includes the typical

fundamentals for leading people and managing resources in a traditional office environment.

Difficulties in the traditional environment, however, can be magnified significantly in virtual or remote situations. Difficulty in communications, working together and producing high-quality on-time results typically is heightened by distance. Effective leaders need to quickly, confidently and competently diagnose such issues and take deliberate actions to keep project team relationships, productivity and outcomes on track. There is even more emphasis on the use of appropriate communications skills to fit the needs of both the people and the situation.

The research also reveals a profile of employees who operate well in virtual project team situations. When possible, it is advisable to select team members who already demonstrate these characteristics or who are willing and able to quickly develop them. These employees tend to be more comfortable and effective if they are:



- able to perform the core task for their roles
- self-disciplined
- goal-directed
- flexible
- collaborative
- willing to share and exchange information
- open to feedback, change, differences in people and culture, ways of thinking, other discipline models or signature skills, and alternative approaches to processes
- committed and connected to the business
- competent in using the technology required for their roles

#### **A MODEL FOR LEADING FROM A DISTANCE**

A model of effective leadership from a distance or with a virtual project team can be demonstrated as a visual image of a camera with a telephoto lens. Similar to the mechanics of operating such a camera to secure a clear image of a distant situation, effective leaders adjust their communications and method of technology to bring situations into focus. Deliberately applying the five categories of essential leadership skills for leading from a distance (outlined below) gives leaders an enlarged and clearer image of a distant situation.

Virtual project team leaders typically get brief “situational” snapshots via communication such as voice mail, e-mail and pager messages. Effective leaders need to quickly and skillfully diagnose what’s happening, determine what action is

required, and adjust how they communicate and what technology will achieve the desired results.

#### **TAKE 5: CATEGORIES OF EFFECTIVE LEADERSHIP**

The five categories of effective leadership skills in virtual project team or distance management situations are:

##### **1. Communicating effectively**

Effective communication is key with virtual project teams. It requires careful attention to listening, how we present our own thoughts and ideas, a clear focus on positive and constructive intent, choosing the right technology to quickly and sensitively communicate a clear message, and taking extra steps to respectfully ensure understanding and expectations for action. It includes important feedback loops and networking and often requires daily contact during fast-changing times.

Effective communication also requires careful diagnosis of any given situation to discern not only the task or work objective in question, but also the obvious or hidden emotional content within the situation. It requires deliberate attention to the needs of project team members and their desire for timely, sensitive action. An effective technique is to establish communications ground rules that meet the needs of the project team and the leader.

Following are observable leadership behaviors for communicating effectively with a virtual project team:

- Model the organization’s values and members’ ground rules in all communications

- Communicate in a way that meets the needs of members as well as the situation
- Apply communications technology that best fits the situation, and help all members apply available technology for communication with confidence
- Formulate specific objectives and an organized delivery plan for communication
- Link messages to the members' shared purpose and goals, and link performance contributions to results
- Encourage all members in a conversation to participate fully
- Listen proactively
- Verify understanding of the message and expectations for action
- Guide communications to achieve positive and constructive outcomes
- Coach and offer feedback with respect and support

Once the leader determines which communication method is appropriate for the situation, the technology, if any, that best fits or is preferred by team members can be selected.

Face-to-face communication has its place, as well, namely when addressing issues of high emotional content. Such issues include anxiety, loss of cohesion in the group, self-doubt, over-sensitivity to an issue, under-performance, alienation from other team members, restlessness, distrust, dissatisfaction, paranoia, indecision, confusion, toxic worry, dis-

connection, mental fatigue, ambiguity, burn-out and social isolation.

Face-to-face communication also helps develop sensitivity to diversity and is important for social contracting, bonding and realizing the benefits of human contact on performance. Positioned and managed well, this type of communication builds community and strengthens connections to the business.

## 2. Building community

Research shows a sense of community is based on mutual trust, respect, fairness and affiliation among members. It includes sensitivity to differences and establishing and adhering to ground rules on how the team will work together.

Mutual trust must be established at the beginning of a work relationship. Trust is fragile; it requires clarity of intent. Over time, actions that fulfill commitments solidify the trust. This is especially important for virtual project team members who have diverse skills or represent different technical disciplines. Effective leaders should consider an initial face-to-face meeting to orient members toward constructive intent built on community and trust.

As an example, an international privately held software development firm with multiple virtual product development and project support teams began to miss critical development deadlines with key customers. Once the organization uncovered and addressed specific roadblocks to their mutual sense of community and trust, it quickly got back on schedule.



Trust also is essential to social contracting, especially among knowledge workers. It often begins or grows when knowledge is willingly shared. Consistent, positive, respectful interactions among members create a strong bond of trust that serves as glue for the community.

The perception of fairness is another important element. As team members observe day-to-day activity, they naturally form opinions about the fairness of any given situation. An action or situation that prompts a member to perceive bias, cultural insensitivity, or unethical or unbalanced treatment of others can directly affect that member's desire to support the project team and its goals.

The need for affiliation—for belonging, for identifying with a respected group, for pursuing a worthy objective or noble purpose with colleagues, for some level of bonding—is important for overcoming social isolation, alienation and disconnection.

All of these elements are typically portrayed in the unique ground rules a virtual project team establishes for itself. These ground rules demonstrate attention to building community. They often include keeping commitments, providing feedback in preferred ways, giving everyone an equal voice, sharing important information, acknowledging preferences for type and frequency of communications, and other unique points for how the project team wants to work together.

Here are the observable behaviors that promote and build community:

- Model the behaviors expected of all members
- Maintain the self-confidence and self-esteem of others
- Demonstrate respect for all members and their opinions
- Encourage all members to participate fully
- Focus on the situation, issue or behavior, not on the person
- Confront issues with others directly
- Take initiative to make things better
- Keep confidences
- Maintain constructive relationships
- Keep commitments
- Admit mistakes

### 3. Establishing a clear and inspiring shared purpose

The importance of establishing a clear and inspiring shared purpose, a common vision, and accompanying goals and expectations for performance has received much attention in recent years.

This category of leadership skills is another essential area that requires deliberate attention in effectively leading from a distance. It requires taking initiative to ensure all members are involved in creating or understanding the purpose and vision of the group or a spe-

cific project. It is important for all members to have sufficient opportunity to voice their respective opinions.

This full involvement in creating a shared purpose or common vision serves as a foundation for unified project team commitment. When coupled with clear expectations for contributions and measurable performance, this combination of elements can be an effective driving force for self-discipline and motivation. Coupled with a sense of community, there can be a reduced need for continuous monitoring and control mechanisms in order to achieve team goals.

This category can become one of the effective secrets for shifting from control to member self-management. Day-to-day, moment-to-moment, transaction-to-transaction, the members can self-coach on the organization's vision, the project team's vision, its sense of purpose, specific goals and expectations for contribution. This vision is essential for virtual project teams that are purposefully undertaking highly creative or innovative approaches.

The observable leadership behaviors for this category include:

- Share information about the organization's mission, vision, strategies and goals
- Clarify the rationale and intent of strategies and goals
- Provide clear expectations for contributions and measurable results
- Ensure members are involved in decisions that affect their work

- Seek ideas and opinions from all members
- Ensure consideration of customer needs when planning work
- Use the organization's core values to guide the members' planning, decisions and actions
- Promote creativity and innovation in undertaking new goals or opportunities
- Help members develop positive approaches to the needs of the organization
- Challenge assumptions that may inhibit progress
- Demonstrate flexibility in adapting to changes in goals and expectations

#### 4. Leading by example with a focus on visible, measurable results

Leading by example with a focus on visible, measurable results is a natural extension of the previous category. The clear and inspiring shared purpose, vision, and resulting project team's goals and expectations become targets for establishing individual and team contributions.

The important distinction for virtual project teams is the need to make "out-of-sight" contributions as visible as possible. Individual members need to know how their roles and tasks directly contribute to achieving group and organizational goals. They need to understand how customer needs are met by their contributions.

On a day-to-day basis, they need to self-direct and self-discipline their work on clear priori-

ties. They need to deliver visible, measurable outputs, transactions or next steps in key processes. Preferably, they are able to self-track their contributions and measurable progress toward specific goals.

This often means the project team needs to ponder the critical path for achieving a specific goal. Deliberate attention is focused on how each member contributes content and/or key process transactions each step of the way. Particular attention is paid to the interdependencies among members' contributions. There are detailed discussions about what information or output needs to be delivered by when and in what condition in order for the next member to take action. One way to describe this activity is managing intersections of mutual accountability or handoffs.

In adopting this approach for day-to-day activity, group members engage in goal-directed self-discipline for completing essential tasks and making visible, measurable contributions to results. In essence, the locus for control subtly shifts from the traditional manager role to group members. Personal responsibility and ownership for results set in, and members tend to deliver more energy, creativity and innovation—and greater achievement.

For example, a virtual project team with a variety of signature skills was brought together for the first time to turn around a disappointing situation with a major customer. Each member needed a clear understanding of performance expectations and how their respective, visible contributions fit into a complex, critical path of product development activity.

The project team leader decided to set even

more aggressive schedules to renew customer confidence and provided more frequent opportunities for the team to come together electronically with the customer to demonstrate progress. The actions were akin to joint innovation to restore the business relationship while meeting product requirements.

In this category of effective leadership, each opportunity for communication on an individual or project team basis includes clear focus on the visible, measurable contributions that produce high-impact results. Effective leaders inspire members to reach and exceed performance expectations. They understand the capabilities required for such achievement and ensure all members have the necessary skills and knowledge. They also ensure team members have the equipment and tools to make their critical contributions.

Effective leadership from a distance also means asking the right questions, staying alert for early coaching opportunities, providing constructive feedback and reinforcing contributions.

The observable leadership behaviors for this category include:

- Link work contributions to the organization's goals
- Ensure all members know how their contributions affect customers
- Help all members understand their roles and responsibilities
- Emphasize identifying visible contributions and setting verifiable goals

- Track contributions and measurable progress on goals
- Ensure members plan appropriately to achieve results
- Inspire members to reach or exceed expectations for performance and results
- Emphasize the need for goal-directed self-discipline in completing daily work
- Use performance contributions and results to guide communications and agendas
- Seek opportunities to recognize members' contributions to results

#### 5. Coordinating and collaborating across boundaries

The fifth category involves coordinating and collaborating across boundaries. This includes extending the same level of trust, respect, teamwork, collaboration and focus on visible contributions that appears within your own project team to other individuals or groups within your organization, as well as customers and suppliers. This set of behaviors includes smooth coordination of key processes or projects that may cross a number of natural organizational boundaries. Information or technical assistance outside the project team's capabilities may be needed.

While coordination and collaboration across boundaries can be uncomfortable or difficult in the traditional organizational structure, it magnifies when complicated by distance. In many cases, a project team leader needs to remove protective "firewalls" that have been constructed at those boundaries. There also is often a need to diagnose and handle differ-

ences, challenge assumptions and defuse the potential for conflict.

Here are the observable behaviors that are effective in coordinating and collaborating across boundaries:

- Seek ways to build teamwork and collaboration across groups and functions
- Establish mutual involvement in situations that cross organizational boundaries
- Link the need for coordination and collaboration to the needs of the customer and the organization
- Help members identify opportunities for improvement in projects and processes that cross organizational boundaries
- Help members plan, coordinate and implement projects and processes across boundaries
- Help members diagnose and solve problems
- Help members track progress in projects and processes across boundaries
- Promote information sharing in situations of mutual interest
- Ask for the specific support you need, and communicate what you will do in return
- Challenge unnecessary barriers to collaboration across boundaries
- Help members move constructively from conflict to collaboration



In summary, research and best practices reveal that the five categories of effective leadership skills for virtual project teams serve as a sound basis for achieving results while meeting team member needs.

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focus on skills training and consulting services in sales performance, customer service, leadership and teamwork.

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