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## Managing projects virtually *four conditions to succeed*

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### **Abstract**

This article discusses four major lessons learned and conditions towards succeeding when managing a project virtually and/or working with project virtual teams. Working virtually is a trend that is growing fast worldwide; many leading global companies are looking for this different way of work, to attract and retain key talent, to decrease costs, to protect the environment, to be more competitive and responsive to the market, to improve their offers to their employees, etc. This article presents important things to consider before starting managing in this scenario, and presents a particular case: when the Project Manager is thousands of miles away from the project team. The concepts presented can be applied to any virtual team.

### **1- From day zero, not assuming that we know how to work virtually**

If you don't have experience managing virtually, it is important that from day zero you look for understanding what it means and what you need to make it happen. We are probably used to working virtually some hours a week, however, working virtually full time is different, and it is harder when the project team is in a distant location and you only interact electronically for months. There you definitely need to master the virtual environment.

So my first suggestion is, don't assume you know how to do it or the people around you know. Look to learn and understand how to work virtually and what are the tools and level of support needed for it. That includes the support needed from your team, your managers, and your company.

Don't wait to have spare time or issues to do it. There is information and papers about working in this context; what are the technology tools needed to be effective? You can learn right away how to determine what your project needs to support your project virtual team

Once you understand some key principles of working virtually you will be able to go to the next level of performance, productivity, team trust, collaboration, communication, and results.

### **2- Understanding that working virtually is neither better nor worse than working co-located, it is just different**

Not better or worse, just different. Managing virtually requires different skills from the project manager, the managers, the project team, and some key stakeholders.

Sometimes there is the option of avoiding the virtual team; but sometimes it is a requirement like for example, when you don't have the resources (human/materials) available in your location, so it is important to be prepared to manage a virtual force. As Ann Bamesberger, Vice President of Open Work Services at Sun Microsystems Inc. said<sup>1</sup>: “**knowing how to manage a virtual force is an imperative of the new millennium.**”

For many companies working virtually has given them the opportunities they needed, and options to even save their company. There is an extensive list of benefits and savings for the company, the employees, and the environment that virtual teams can provide. However, that not only requires different skills, it also requires specific training, different support and technology tools that are not optional. Not having the specific skills, training, tools, and support for this environment are strong reasons why the project could fail in the virtual environment.

One simple way to improve the success chances is to have formal training on virtual work with the stakeholders that work closest to the team. In general, we believe that training the project manager is enough, however, it also required for the team, and other stakeholders that need to interact virtually. If the stakeholders don't understand how to work in a different environment, and how to support the project manager and the team, then the chances to be successful are reduced.

### **3- Managing virtually needs to be done with consistently using the right tools.**

There are two essential aspects below that the stakeholders need to understand in this context.

First, by definition **a virtual team is a team that instead of interacting face-to-face, it interacts electronically.** Thus if the team does not have the right technology tools to use, or they have it but they are not required to use it, then we are not maximizing opportunities and doing all they can to make this interaction succeed.

The management needs to ensure that the virtual teams have the technology tools needed, and that they are being used. This can be done by establishing that in the team norms or policies related to the use of the tools, or in the Communications Plan with the management approval.

Most of the communication challenges in a virtual team emerge as a result of the lack of face-to-face interaction. Thus, it is an imperative to provide the tools needed to aid with the lack of face-to-face interaction, and with the virtual distance.

Second, the Project Manager needs to learn how to master the technology tools, to communicate to the team which tools will be used in each context, and to establish in the team norms those specifics to virtual teams like e.g., if the team needs to use a whiteboard to interact with people co-located and people virtually, then a physical whiteboard should not be allowed, and a web conferencing whiteboard should be used instead. That way, not only the team members co-located get to see the whiteboard but also those who are connecting virtually.

There is important literature around the use of different technology tools with virtual teams and in which context each of those tools is most effective that project managers who work virtually

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<sup>1</sup> [www.sun.com](http://www.sun.com)

should review. Examples of those tools are videoconferencing, web conferencing, teleconferencing, instant messaging, e-mail, palms, phones, collaboration tools, virtual worlds, social networking tools, etc.

I have found that sometimes it is difficult to make some stakeholders understand that we need more than the use of e-mail and phones for a virtual team. The same way we cannot use a plane to navigate the sea, we cannot use a phone and e-mails for each need we have to communicate virtually. There is an appropriate transportation means for each way of travel, and there is an appropriate technology tool for each virtual communication scenario.

Each of those tools is better depending on who we need to communicate with, in which context, and what the urgency of the message is. For example, when we need to have the closest match to face-to-face meetings, to see body language, to have formal meetings, etc., videoconferencing is probably the best option. When we need to show a presentation with slides and visuals, share the desktop, or use a whiteboard, then, web conferencing is the best choice. When we need to see if someone is available, or ask a quick question to get an immediate answer, then the chat is a great option. E-mail is an especially challenging tool to use across different cultures, and when technical team members are involved there may be challenges to understand text based messages, and sometimes different interpretations could be done according to each culture.

It is risky to assume that we can work virtually with the same tools that we work co-located. Working virtually has its own particularities, challenges, and environment. Some of those tools can be used in both environments, others are different.

#### **4 - The company and management support is an imperative.**

In general, a project is not something someone can do alone. A virtual project means a virtual project team supporting the virtual rules and environment.

You will not succeed without the support of the team and especially the support of the management who will facilitate the team the tools needed, and will make sure the norms needed to support the virtual team are in place.

The support of the managers and executives for the virtual environment can be seen through different actions. For example, making sure the needed decisions are made to facilitate the purchase, installation and/or support of the needed tools. Making sure that there are policies to ensure that the team knows what is expected from them in terms of the effective use of those tools.

When we work virtually in a company that has in place Formal Programs to work virtually, then the management's effort to support this is simpler because the policies are already in place and the tools are in use. However, not all the companies have experience working virtually, so the less experience, formality, and maturity we have around this, the more effort it will require from the project manager and the managers to make this work successful.

Another important aspect in regards to management support has to do with "preaching with their example". E.g., if a manager says: you need to support the virtual team members, but then this

manager is not including them in important project discussions, decisions, meetings held on site, etc., then he/she is sending contradictory messages to the team that “it is not as important to have the virtual team members involved”. **Supporting the virtual team means involving the virtual team members as much as we would involve the co-located team members.** Not doing so contributes to decreasing the motivation of the virtual team members and when that happens with the project manager, to decrease the leadership that he/she has.

There is an article<sup>2</sup> where a manager of a virtual team gives recommendations to other managers saying: “*managing a virtual team is challenging but not impossible, **it will require that managers examine their management style so that their remote people feel that their access to them is as easy as the access the local team has. Manage the remote people like they are local, and manage the local people like they are remote.** The most successful approach to me was to have a scheduled time for everybody to have access to me. I made it a point to schedule a little more time with the remote people than the local one.*”

## Conclusion

Working or managing projects virtually has many aspects to be discussed that an entire book could be written. We just focused on discussing four important aspects to consider in first place when we need to manage a project or a team virtually.

I have researched how leading companies succeed with virtual teams, and I have seen teams not succeeding in this environment. I have had the opportunity of working virtually in different contexts, companies, and teams, and I noticed how the four items discussed can contribute or not to the success of the virtual project team in each scenario.

The trend of working/managing virtually continues to grow. In the first six months of 2008, Virtual Worlds<sup>3</sup> increased almost USD 300 millions in investments, leading companies like Sun Microsystems have around 50%<sup>4</sup> of their employees working virtually, IBM has 40% of their employees without offices in the company, younger employees like most of those at Boeing Corp prefer to work virtually than co-located. What is more, they value the flexibility given to them to balance their work life with their personal life, and for Boeing it is an imperative to attract and retain young talent. For managers at Intel who manage virtual teams of more than 200 people, the virtual work program is the way they can gain/retain key and creative talent that otherwise they would lose. Working virtually is giving global companies the possibility to reduce their costs as happens with Sun Microsystems, which saves USD 300 million a year in real estate costs. It is also the opportunity to extend the working day from 8 hours a day to 24x7 coverage.

So, the question is why managing virtually and virtual projects succeed in some companies and not always in some others? Why sometimes they are as productive as co-located teams, and sometimes they don't provide the same results as co-located teams?

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<sup>2</sup> <http://blogs.techrepublic.com.com/tech-manager/?p=328&tag=rbxccntr1>

<sup>3</sup> According to Virtual Worlds Management, a media company that covers the industry

<sup>4</sup> [http://www.businessweek.com/magazine/content/05\\_50/b3963137.htm](http://www.businessweek.com/magazine/content/05_50/b3963137.htm)

I hope the comments provided help to think about some of the reasons and answers. I have had opportunities to learn from the different virtual teams I have worked with. As time goes by, I become more and more convinced of how powerful is the fact that in our projects we can take advantage of the use of virtual teams. So I challenge you to keep on learning about this topic and to see how to fill in the gaps you may have in your virtual teams. There are great companies with great results in their flexible work or virtual work programs; these are the companies we should look at as examples and as sources of information, motivation and strength.

Working virtually is not a fashion. It is here to stay. Those companies and Project Managers who take advantage of this concept will be more competitive in the short and longer term.

In a time of international crisis like the one we face, working virtually can be an incredible way to decrease project costs while retaining key talent for the project benefit. It will just require us to learn how to work in this different environment if we haven't done so already.

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