

## PM WORLD TODAY – PM ADVISORY – JULY 2010

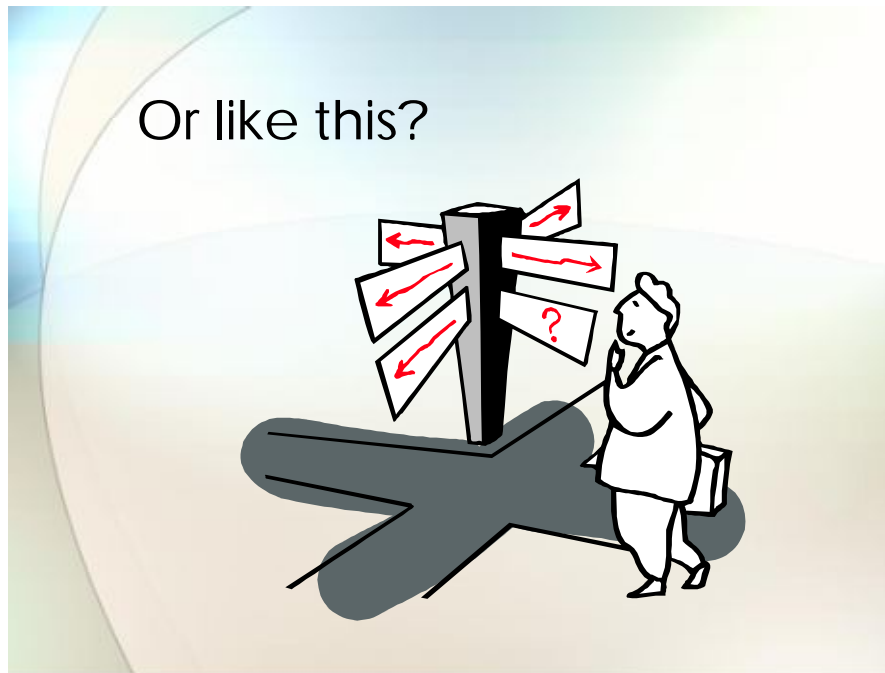
## Important Aspects of Communications for Virtual Team

By **Michelle S. Vann**, PgMP, PMP

As stated in the PMBOK, “Communication has been identified as one of the single biggest reasons for project success or failure.” (PMBOK 4<sup>th</sup> Ed. Appendix G.4) In many companies, we’re virtually-located across the globe. Conference calls, e-mails, and shared websites are key communications tools. We strive to make the best use of everyone’s time as we plan, verify, monitor and control the progress of the project.

One of the most important aspects and best examples of communications for virtual teams is the conference call or virtual meeting. This article will examine the important aspects of communications for virtual teams by focusing on the communication method that utilizes many different skills—a conference call.





Have you ever attended a conference call and asked yourself, “Why am I here?” or “What was the purpose of this call, anyway?” Then, there were other calls that you thought were clear, concise, and right on the mark. What makes the difference between these two types of calls? YOU!

You, as the project or program manager, are responsible for Project Integration Management. Working with virtual teams for over 20 years has led me to develop a checklist, or tool kit that I would like to share with you today. These techniques can be used before, during, and after the call. It may seem simple, but complete execution of all of these steps is a learned habit, and even the best of us can fall short. I urge you to carefully read this article, and then select an item or two that you’d like to add to your personal PM tool kit.

Some of the many different types of conference calls or virtual meetings:

- Project Kickoff Meeting!
- Training Small or Large Groups
- Working Meeting
- Status Meeting to/from you
- One-time meeting
- Recurring Calls
- Staff Meeting
- End-of-Project Celebration Meeting!




First, and foremost, we need to identify the type of call or meeting, the goals, and the attendees needed. Sometimes, a stakeholder will provide this information, and other times, it will be PM-driven. A call may be for a large group or a small group. You may be seeking or presenting status. This may be a one-time meeting or a recurring call. This may be a working meeting or a training call. There may be one or several goals to consider for the meeting.

As you develop the list of meeting goals, please consider that each goal may require a separate list of attendees, which could necessitate or drive the need for multiple meetings, in order to make the best use of everyone's time. Once the type of meeting, and the goals and attendees needed are known, then the agenda, duration, needed media and date/time for the meeting can be established.

## Some tips on scheduling meetings

Divide your attendee list into:

1. Material participants who are mandatory for the call's success
2. Optional participants who have a stake in the results and can help the meeting move forward towards its goals
3. Team members or stakeholders who only need to see notes/action items/issues from the meeting



If you are unable to check an invitee's electronic calendar, remember to include possible alternate dates/times with the meeting invitation.

In Andy Crowe's book, *Alpha Project Managers: What the top 2% know that everyone else does not*, he states, "By asking for input, the project manager creates an expectation with the stakeholders that the input matters." (*Alpha Project Mangers, p.86-87, Copyright 2006 by Andy Crowe, a Velociteach publication*).

In other words, by working with the stakeholders to establish the agenda and confirm the goals of the call, more attention will be paid to the success of the call. Ensure that the goals of the call are clearly stated: simple, effective, and timely. Be realistic about what can be accomplished with a single call. Be sure to follow company policy for media use and meeting scheduling.

Pre-meeting preparation can be expected to take some time. A teacher's rule is to allow at least one hour, and ideally three hours, of preparation for every hour of class. A student's rule is to figure several hours of homework for every hour of class. The same level of preparation can be expected from a good project manager. Develop an understanding of the documents or issues to be discussed. If this is a status call, prepare to present or receive the status. If the call is to make a decision, ensure that the options are clearly documented and researched for project impact prior to the call. Ensure that any shared documents are posted on a shared website or shared drive, or are distributed via e-mail prior to the call, based on company policy.

Media for Virtual Meetings, examples from my company, AT&T:

- AT&T Connect® Web Conferencing
- AT&T Telepresence Solution
- AT&T IP Audio Conferencing Service
- AT&T Conferencing Service Video
- AT&T Conferencing Service Global



Please visit <http://www.att.com> if you'd like to learn more.

Always open your media early, and if possible, greet people as they arrive on the call. How early to open the meeting room or conference bridge depends on custom and policy. Greeting people by name builds trust.

The second key technique that I would like to share is for keeping the call on-track. This means that most of the conversation on the call should be focused on discussing items on the agenda. Most calls begin with an overview of the agenda. Carrying this further, introductions may need to be made. These introductions may be very brief or somewhat lengthy.

Assume that covering agenda items on working meetings will start a few minutes after the appointed start time. Identifying allotted time up-front for each agenda item can be helpful in controlling the flow of the call. Being mindful and practicing active listening techniques will aid in developing a common understanding among the participants. Developing both negotiation and mediation skills, and also a technical understanding of the scope that is being delivered with the project will aid you in keeping the call on track.

Sometimes, a meeting will take a tangent, or require side-bar conversations. These may either be resolved on the call, if brief, or must be noted as follow-up items for discussion and resolution at a future date. It's always good to keep the risks/opportunities log handy! Remember, your goal is to keep the call relevant and timely. The slower the call, the more likely it is that attendees will multitask, pulling their attention away from your meeting.

Levels of management, client participation, and cultural differences will all play a factor in the progress of the call. Be aware that some participants on the call may not speak directly on the call if their management is present, while other participants are quite boisterous. A good reference for cross-cultural communications is a book by Moran, Harris, and Moran titled, *Managing Cultural Differences, Seventh Edition: Global Leadership Strategies for the 21st Century*. Sharing an important bit of wisdom, the authors state, “Culture does count.” (*Managing Cultural Differences 7<sup>th</sup> Edition, p.3, Copyright 2007 Elsevier, Inc., Butterworth-Heinemann publication*). Always double your estimate of meeting duration when managing cultural differences.

While you must never lose your temper on a call, be sure to use your voice. A high-quality phone or headset is a must. The team has to be able to hear you clearly and your voice must be able to cut through cross-conversations, if necessary.

### Tips on Target Dates for Action Items

- Follow Project Plan’s Work Breakdown
- Look at inputs/outputs
- By when must the work be final, completed, or approved versus just a draft?
- Is this work on the critical path for the project?
- What must be done before/after this work?
- What is the availability of resources to do this work?



The third key item is during the course of the call, to clearly note agreements and resolved items, and also develop a list of next actions with owners and target dates. Never be embarrassed to ask for the correct spellings of words or names.

Aim for short-term wins, as discussed in John P. Kotter and Dan S. Cohen’s book, *The Heart of Change: Real-Life Stories of How People Change Their Organizations*. The authors state, “Without sufficient wins that are visible, timely, unambiguous, and meaningful to others, change efforts inevitably run into serious problems.” (*The Heart of Change, p.125, copyright 2002 John P. Kotter and Deloitte Consulting LLC, Harvard*

**Business School Publishing).** This same philosophy applies to meetings. Look for the wins, and strive to maintain a positive working atmosphere. As my company says, “Rethink Possible™.” (TM AT&T)

Key item number four is: Be sure to end the call on time, or gain agreement from the stakeholders if the call is to run past the scheduled stopping time. Overrunning the meeting time shows both a lack of organization and a lack of respect for the attendees. Neither of these are good messages to share.

A good technique for keeping the call on-time, or on schedule, is to announce a time-check, along with the agenda items that must still be covered on the call. A time-check is simply announcing how much time is remaining for the call. Depending on the nature of the call, it may or may not be permissible for you to forcibly change topics. Ensure that you know the company guidelines or customs prior to the call.

Thank callers for their participation and for their time. We all need to feel appreciated, even when we work in virtual teams.

And finally, key item number five is: Distribute or post notes and action items in a timely manner. Interlock with the action-item owners after the call to ensure each action item and deliverable target date is clearly understood, gathering any additional risks or issues identified after the call. Schedule future meetings, following the guidelines in key item number one.

And so the iterative process of communication for virtual teams begins again.



Some new tools for your PM toolbox!

- 1) Identify and Prepare
  - Identify the type of call, goals, and attendees.
  - Prepare the agenda, duration, media, and scheduling.
- 2) Keep the meeting on-track to meet the goals of the call.
- 3) Take good notes of agreements, action items, owners, and target dates.
- 4) End on time.
- 5) Confirm understanding.
  - Distribute or post notes, logs, and action items.
  - confirm understanding with the owners of action items.

With these five techniques that I've discussed today, you will reach a higher level of productivity on virtual team meetings. To recap, (1) Identify and prepare, (2) Keep the meeting on-track, (3) Take good notes, (4) End on time, and (5) Confirm understanding.

Thank you for your time, and I wish you the best in your continued practice of Project Management.

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