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Cooperative Collaboration: *The Virtual Team Approach*

Conversation, Awareness, and Coordination – A Shared Commitment

Productivity and results are the primary factors for making the Virtual Team approach successful. These factors can be successful when everyone contributes creative techniques to develop relationships and build trust through a geographically dispersed team.

This outline can serve as a checklist to assist you with your interest in developing Virtual Teams for collaboration.

Please note, topics within the primary categories (in **bold**) are not mutually exclusive; that is, they may have ‘shared aspects,’ and they are not necessarily listed any specific order of importance.

A Blue Print for Building a Virtual Team

- Based on trust and commitment
- Agreement on the need for a common purpose
- Team member skills inventory—strengths, contributions we feel we can make to the team, identifying areas for improvement
- Address conflict management—what potential conflicts might arise and how do team members plan resolve these conflicts
- Determine who is to be the lead member
- Number of team members—having too many cooks in the kitchen does not work
- Obtaining team members’ contact information—phone, fax, E-mail address
- How will team meetings and conferencing be done
- How to exchange information (text files, graphics, etc.)

- Tools & methods to avoid ‘communication breakdown’
  - BaseCamp, SharePoint, GoToMeeting, Skype, WebEx
  - Learn properly & properly utilize
- Maintaining productivity to achieve results
- Time zone differences

Acquiring Projects

- Who finds projects—I think much of that has to do with the market and what is really out there. For some inquiries (where I at least have the opportunity to speak with someone about a possible project), I am asking such questions as: how large is the project, do you (the client) have your own people to do 'this, that, and the other," can parts (or all) of the project be done off-site. The number of team members to assemble for collaboration depends on the project, where promoting the numbers of members may not work as well as assembling the team once the details are better known.
- Determining prospective clients
- How to approach prospective clients
- Focusing on the ‘right types’ of projects and common agreement on these
- Creating a formal letter of engagement or contract (also, what ‘boilerplate’ provisions a contract should contain)
- Promoting one’s service through a Web site, resume, networking, various marketing approaches, etc.
- Securing and maintaining credibility for your work or service
- W-2 or 1099 (if 1099, ensuring the budget is there and getting a purchase order)
- Billing for services (possibly securing a retainer, invoicing, net terms, etc.)
- Determining pay rates
- Bid types (fixed vs. hourly)
- Time reporting methods
- Who processes payroll and withholding

Once Projects are Acquired, Fulfilling the Obligations (to the client AND to each other)

- Project ownership—whomever acquires the project on which collaboration would come into play would be the owner. Of course, if someone does not have the experience with being a project leader or simply would not want to be the leader, then things might become a bit more 'complex,' so to speak. My own comfort level with this would be to look at things on a case-by-case basis, which may not be a shared thought (please see following bullet item as well).
- Does the client want to provide complete control of the project or assist you with managing activities
- Common agreement on responsibilities, tasks, activities, etc.
- Work closely with the Virtual Team to develop a tailored, not a "boiler plate," approach (including designing publication style templates, project planning and scheduling, and publication delivery)
- Preliminary project plan—as a minimum, identification of the tasks involved, who will be responsible for each task, completion date for each task, defining responsibilities to achieve goals, identifying the client's key contact(s)
- Provide timely status on a regular basis that includes objectives, accomplishments, and any issues to keep the project on track
- Maintain continual and timely communication, feedback, Team support, and assistance, especially in situations where clarification is required
- Determine methods for performing research and using the client's products to source the most adequate and accurate information for the specified audience(s)
- Determine if on-site working sessions are required and who will schedule them and travel, as necessary
- Methods for exchanging project information (text files, graphics, business correspondences, etc.)
- When conducting virtual meetings, make them effective - provide everyone a copy of the agenda and of any materials to be discussed ahead of time so Team members can prepare to participate in the conversation. If appropriate and/or necessary, at the end of each virtual meeting conduct a brief evaluation to find out how you can continuously improve the meeting process.
- As required, schedule, and participate in, on-site meetings, design reviews, and training sessions. This will depend upon the proximity of the client to where you work.