

Mastering flexibility

Part of an inclusive culture



Effective ways to team virtually

Making virtual connections

Technology can help virtual teams connect, communicate and collaborate productively. To choose the best technology for each situation, evaluate your options. Visit <http://techref.ey.net> to learn about the Ernst & Young technology options (e.g., audio conferencing, Sametime, webcasts) that will support your team's needs. For example, determine if it is useful to develop a community homepage, discussion board or eRoom to house pertinent materials, team calendars, pictures and profiles of team members, and a chat room for team topics. These tools let teams collaborate and share ideas as well as personal items.

Virtual teams that tap talent from far-flung places are quickly becoming the norm in many global organizations, and Ernst & Young is no exception. We assemble diverse teams that include people from different countries and different backgrounds, or those who work in a different location or from home. This means that routine team meetings are seldom face-to-face. We meet this challenge by providing leaders with the tools and support they need to coach virtual teams to achieve successful results.

Think differently

Virtual meetings offer many benefits, including the ability to accommodate a greater number of people's schedules, schedule meetings at short notice, reduce travel expenses, be more eco-friendly and decrease unproductive travel time. But in order to help virtual teams achieve their true potential, you may find you need to think differently about what it means to be effective. Flexibility, creativity and openness to new ideas may help. For example, if your team includes members from multiple time zones, scheduling regular conference calls at times convenient for everyone may not be possible. However, it might be possible to "rotate the convenience" by shifting the start time so that people take turns participating in the calls during their early morning or late evening.

Shatter old assumptions, adopt new norms

Start by identifying old assumptions about managing effectively in order to embrace new norms for virtual teams.

Examples of old assumptions include:

- ▶ Face-to-face communication is ideal.
- ▶ Superior outcomes result when team members have worked together before.
- ▶ Collaboration occurs best when team members interact directly.
- ▶ Learning to manage virtual teams is simply learning how to use technology.

Examples of new norms include:

- ▶ Timely communication is essential.
- ▶ A diverse team brings broader experience and knowledge to the table.
- ▶ Effective collaboration can cross boundaries and time zones if everyone on the team understands and uses the same tools.
- ▶ Managing virtual teams is about the people; technology simply facilitates relationships.

Understand cross-cultural differences

Often virtual teams cross cultural as well as geographical boundaries, and respecting cultural differences is essential for the team to work together effectively. *Kiss, Bow, or Shake Hands: How to Do Business in Sixty Countries*, a book by Terri Morrison, Wayne A. Conaway and George A. Borden, offers specifics on cultural differences and ideas for handling common business interactions.

Here are some suggestions for building relationships with individual members of a virtual team:

- ▶ Build trust between yourself and others by being open and honest.
- ▶ Visit each location at least once a year for face-to-face meetings with every team member. Your visits will make each team member feel valued.
- ▶ Be transparent about who you are personally, as well as professionally.
- ▶ For global teams, consider starting each meeting with one or two team members sharing information about their country or region.
- ▶ To help team members share information about one another, consider creating a booklet, a page on a community homepage or a website with every team member's picture and profile.
- ▶ Be personable. Show an interest in the career development and personal well-being of others on your team.
- ▶ Value and respect the diversity in your team. Encourage all members to participate and facilitate discussion around differences of opinion.
- ▶ Recognize individual team members for the results they produce.
- ▶ Make sure team members get together when they are in the same place. This can be done by maintaining team calendars or travel schedules of members to be distributed to the team.

Plan carefully

Virtual meetings require leaders to prepare thoroughly. Meeting participants might live in different time zones, speak different languages and have access to different technologies. Careful planning will lead to a more successful meeting for everyone involved:

- ▶ Make sure all participants have the resources they need to participate, whether that means arranging for a conference room, giving out a toll-free, dial-in number or sending meeting materials in advance.
- ▶ Enlist the help of others on the team in preparing for the meeting logistics as well as in building the agenda.
- ▶ Provide ample opportunities for participants to ask questions throughout the meeting. A chance to review notes and think before moving on to the next portion of the discussion will allow this.
- ▶ Encourage involvement by asking open-ended questions – questions that require more than a “yes” or “no” response. To confirm whether meeting participants share a common understanding of what is being discussed, ask someone to restate the conclusions reached or paraphrase a particular part of the meeting.

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Effective ways to team virtually, continued

- ▶ Encourage those on the phone to participate by periodically asking them first for their input. This is particularly important when leading a meeting with several people in one location and others on the phone.
- ▶ If you notice a person has not contributed to the discussion, specifically ask for their input. In particular, if you know a person has experience or knowledge that would be helpful to the team, encourage involvement by calling on that person.
- ▶ When certain participants dominate the discussion, talk with them privately about the impact on the team and how they can involve others in the next discussion.
- ▶ Enlist the help of others on the team in preparing for the meeting logistics as well as in building the agenda.
- ▶ Send a follow-up email to document and confirm discussions, conclusions and next steps.

Communicate clearly

When virtual teams communicate effectively, confusion is avoided and members know how they are contributing to the team's success. Here are some basic tips for improving communication within your team:

- ▶ Be sure you understand what is expected of you and of your team.
- ▶ Share those expectations with the team and let them know what you expect of them.
- ▶ Help everyone on your team understand Ernst & Young's and our clients' expectations.
- ▶ If feasible, start engagements and projects with face-to-face kick-off meetings.
- ▶ Define when face-to-face interaction adds value and how virtual supervision will be handled.
- ▶ Discuss protocols for scheduling meetings and handling unexpected client requests.
- ▶ Create opportunities to discuss everyone's flexibility needs.
- ▶ Encourage members to explore questions that matter, including questions about how they are working together.
- ▶ Establish and share communication protocols.
- ▶ Send follow-up communications in a timely way and create interim check points to keep projects on track.
- ▶ Incorporate some team-building and sharing time into each virtual meeting agenda.
- ▶ Compile a list of team members' alternate contact information in addition to office numbers. (Note that Ernst & Young's privacy policy may limit disclosure of employees' personal data.)
- ▶ Regularly schedule time on your team members' calendars to stay connected and respond to issues in a timely manner.
- ▶ Respond to emails and voicemails as soon as possible, particularly when there is limited opportunity for informal face-to-face interactions.

Develop a contingency plan

No matter how much effort you put into planning, there may be unexpected problems or technical glitches during a virtual meeting. Be sure to have a contingency plan. Each meeting participant or meeting site representative should have the following information:

- ▶ Contact name and number in case of technical difficulty
- ▶ The best method to get the speaker's attention during the meeting (such as Sametime or whiteboard)
- ▶ Protocol for continuing the meeting if one or more locations have technical problems

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Effective ways to team virtually, continued

Making conference calls better for everybody

As more and more of our time is spent working virtually – with individuals and on virtual teams – it's important that our interactions are effective and efficient. That means adopting practices that make it easier for colleagues to understand and contribute. The tips below will help make conference calls easier to understand for everyone, including non-native English speakers, people who are hard of hearing or deaf (and assisted by sign language interpreters via video), and new team members and people who have had different training or experiences.

1. If you are moderating the call, begin by reviewing these ground rules. Stop the call at intervals and ask if anyone has questions or needs further explanation.
2. Speak slowly, clearly and concisely.
3. Use appropriate volume for the audience and for your voice.
4. Spell out acronyms and define them the first time you use them.
5. Use your mute and remember to turn it off before speaking. Try not to rattle papers, type on your computer, etc.
6. When addressing someone specifically, say his/her name to ensure you have that person's attention.
7. Try to test a cell phone connection before the call begins to ensure that it is clear or consider using a landline for conference calls.
8. Avoid or explain idioms and avoid slang – people from other cultures may not understand.
9. Use slides and/or handouts in addition to voice when practical; it aids understanding for people who are hard of hearing or non-native English speakers.
10. If you don't understand something, ask. Others may also benefit from clarification.
11. Allow for pauses and silence. They give listeners time to catch up.
12. Be aware that if some people are together, while others are on the phone, in-person participants can dominate. Avoid side conversations and repeat any comments that are made in the room.

Additional thoughts if an interpreter or relay operator is involved:

13. Address the participant – do not address an interpreter or relay operator.
14. Indicate when you are done speaking so others know when the discussion starts and stops.
15. Be patient. It takes time for a relay operator to type a message, for the participant to read and respond, and for the operator to read the response aloud.

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Visit inclusiveness.iweb.ey.com and click on "Flexibility" for more information and to see other brochures in this series.

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