



Virtual Team Management

A Comprehensive Guide



What is a Virtual Team?

A virtual team is a team in which proposal team members are geographically distributed and interact primarily through electronic means.

Virtual teams can also include peripheral team members, such as SMEs, and team members from partner companies.



What is a Virtual Team?

A virtual team relies primarily on electronic communication, such as emails, faxes, teleconferences, and virtual meetings.

Advantages of a Virtual Team



Increased productivity

Cost effective

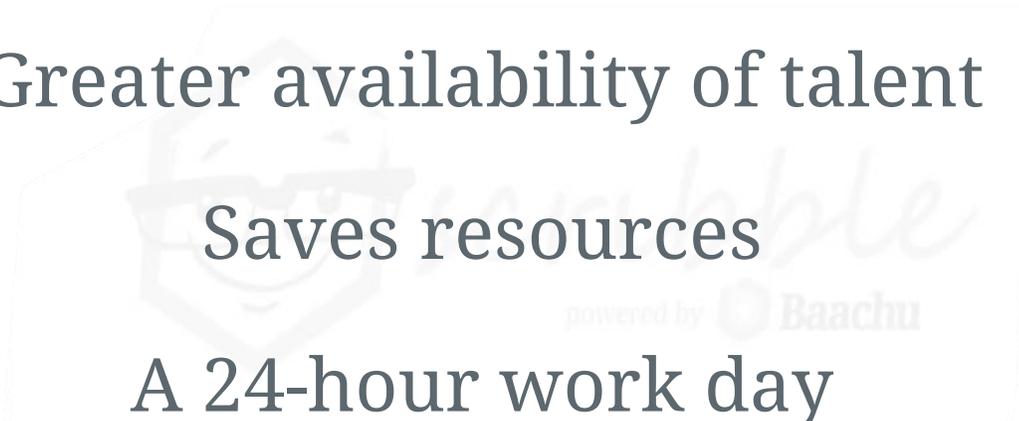
Greater availability of talent

Saves resources

A 24-hour work day

Flexible working conditions

Increased knowledge sharing





Disadvantages of a Virtual Team

Lack of social interaction

Lack of everyday nonverbal, face-to-face communication

Cultural clashes

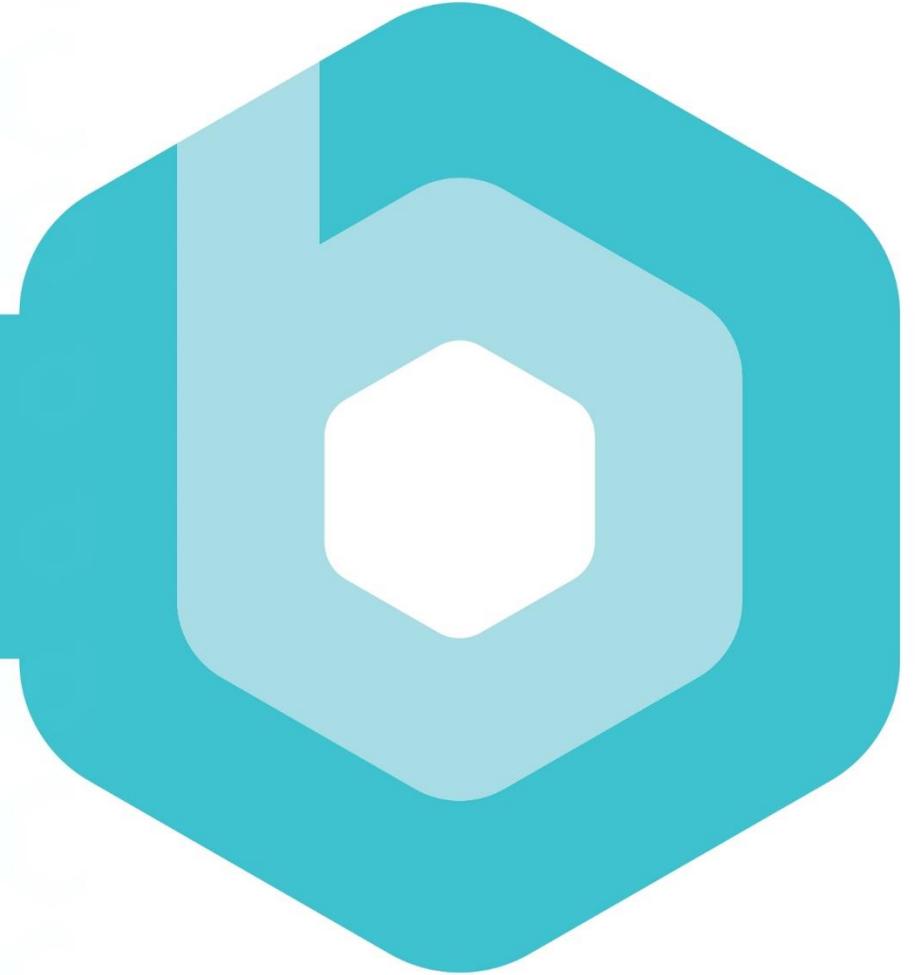
Loss of team spirit

Feelings of isolation and restlessness

Overwork

Lack of software compatibility

Tips to effectively manage a Virtual Team





1. Create a virtual proposal center

Since meeting team members face-to-face is highly rare, create a Virtual Proposal Center.

It is a platform to share resources and information with team members.

Define the features found in your virtual proposal center such document sharing, scheduling, version control, or estimating and pricing to your team members.



1. Create a virtual proposal center

A good virtual proposal center is easy to use, access, and administer. Find tools that meet your budget and have positive reviews from similar organizations.

Some tools are:

Conference Line

Screen-Sharing Tool

Cloud Computing/Centralized Document Sharing

Shared Calendar

Instant Messaging (IM) Tool

Video Screen Capture

Virtual Video Meeting



2. Set a foundation for clear communication

Define the roles of each team member.

Create a master schedule that the team can access, and keep the schedule updated in real time as priorities shift.

Understand the preference, schedule and level of expertise of each team member.



3. Communicate clearly by email and phone

Increase the times and ways you communicate with your team and individual teammates.

Schedule regular meetings at the same time and use the same method.

Improve email communication by creating a standardized and definite mailing format.



3. Communicate clearly by email and phone

Use different techniques to strengthen communication and build rapport among teams. These techniques include:

Phone calls

Act like you are speaking face-to-face

Set reasonable expectations

Celebrate each milestone



4. Conduct virtual reviews

Conducting reviews help in setting clear goals and clearing any doubts.

The types of review your team has should not differ from those of a regular proposal team. These include:

Kickoff Meeting

Daily Stand-Up Review

Document Reviews



a. Kickoff Meeting

The kickoff meeting has the same structure as a formal in-person meeting.

Be prepared with the required documents before the meeting.

Your tone of voice should essentially convey good organization and enthusiasm for winning.



a. Kickoff Meeting

Arrange for as many team members as possible to be physically present for the kickoff.

Provide training for the team on how to use the virtual proposal center, and to access training tools or 24-hour support.

Team members can be briefly coached over the conference line to start off on the same page.



b. Daily Stand-Up Review

The daily stand-up review keeps everyone in touch with the bid and makes sure they are engaged.

Depending on the schedule, team availability, and complexity, the daily stand-up review can take several forms.

Avoid focusing on single issues and take note of tasks that need further discussion and follow up.



c. Document Reviews

The type and frequency of reviews you hold depend on the schedule and complexity of the proposal.

Once you define the number, types, and method to use, confirm with the reviewers their availability and proficiency with any tools or software.



c. Document Reviews

Send an instructional email that clearly defines the purpose and process of review and what the final product should look like.

Schedule 24 to 48 hours for reviewers to respond.

Afterward, contact each reviewer and confirm they received your email and that they will meet the deadline.



5. Close out projects upon completion.

Establish when to close the virtual proposal center, if not defined by your IT department.

Move or archive documents and files to your internal file storage.

Remove all access rights for team members.

Common Pitfalls and Misconceptions



Insufficient infrastructure and communication

Problems can arise among virtual teams due to technological failure or lack of expertise.

Team leaders should be sure to adapt communication methods and structures for virtual team environments.

Formalize principles by which virtual teams should operate, including performance standards.

Failing to build rapport among team members



Be sure to regularly acknowledge all team members.

Building rapport can be difficult without verbal/nonverbal and physical cues.

Set an example of mutual respect in your moderation of teleconferences and other communications.



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