Early on, we mentioned that technology won’t solve all problems related to virtual teams. In fact, basic meeting management and project management skills and techniques are actually more important than trying to use the most sophisticated tools. For example, if you don’t have a meeting agenda with specific topics to discuss, identified decisions that need to be made, and owners for action items, the best virtual meeting tool is not going to automatically do those things for you. At the same time, if we didn’t have the tools we have today, virtual teams would not be possible, and the speed of business would be driven by how many face-to-face meetings we could squeeze into our schedules. Identifying and using the best tools for each situation is a key to maximizing the effectiveness of every virtual team. In many cases, people often start by selecting a tool, try to use it for every situation, and end up frustrated or confused. This is not surprising, since it’s like going to the kitchen, pulling out a bag of flour, and thinking, “Now what can I do with this?” rather than deciding you want to bake some bread and what you really need is bread flour. Let’s look first at what we want to do and then identify the most appropriate tool for that task.

We’ve grouped tasks into four major categories. This was not done after many years of scientific research; there are as many ways to categorize tasks as there are tools to perform those tasks. We came up with these groupings based on the most common things people want to do in a virtual team.
Conversations – Conversations can be real-time live conversations either through voice or text. They can involve two or more people, but usually, if you have more than four people involved, three to four people at most will participate actively in the conversation. In some situations, speed of information exchange is most important, while at other times, ease of joining the conversation is most important.

Document Storage – In the physical world, document storage would be in filing cabinets or libraries. In the virtual world, you still need a place to store your documents and make them available to the people who need to have access to them and protect them from those who should not. These people may be inside or outside of your team, department, organization, company, subsets, or combinations of them all. Secure storage and easy access to authorized team members is the most important aspect here.

Real-Time Sharing – Real-time sharing involves visually sharing information that is either static (e.g., slide presentations for a small group or large classroom audience) or dynamic (e.g., real-time editing of a document). This activity can involve two or 2,000 people effectively. Usually, these interactions include an associated phone call or conference call. The main requirements here are some type of network access and secure or even encrypted connectivity.

Presence – Presence is not really a task or activity, but it is probably one of the most overlooked, powerful, and unappreciated elements of an effective virtual team. Typically a feature of instant messaging tools, this function lets people on your contact list know whether you are available, on the phone, busy, or away. It is a major tool for helping physically distributed teams feel closer by allowing each other to “see” what they are doing. The most important thing here is selecting a single common platform or a platform that is compatible with multiple platforms.

Let’s Talk

Conversations are at the heart of getting work done in a virtual team. People are spending a large amount of time, sometimes the majority of their day, either processing e-mail or talking on the phone. Instant messaging is quickly replacing quick phone calls or e-mail, although many people are still exchanging four to five quick e-mail replies in a matter of minutes as another form of instant