Building Effective Virtual and Remote Teams

An OD Perspective

November 1st, 2011

Speakers

Jon Wagner, from the shores of Lake Simcoe

Russ Milland, from the shores of Lake Ontario

Over 30 years each of experience in business and organizational transformation. Pioneers in virtual and remote team effectiveness and collaboration.
**Goals**

- Introduce the business case for virtual teams
- Explore key elements of effective teams, focusing on 11 virtual and remote team success factors
- Introduce practical, research-based OD approaches to building effective virtual teams and organizations
- Present a case study to illustrate major challenges and intervention strategies
- Invite today's participants to attend a follow-up on-line workshop

**Virtual Work Experience**

**Who here has ...**

1. Attended a webinar or web-based meeting?
2. Participated in a highly collaborative, engaging web-based workshop?
3. Worked on a virtual or remote team?
4. Helped a virtual or remote team improve their effectiveness?
5. Helped an organization build capability to function virtually?
Virtual Work - 1994

Jon Wagner’s “office” is whatever hotel room he’s in, what empty HP cubicle he can borrow or whatever airplane he happens to be on – HP’s Measure Magazine October 1994
What is a Virtual Team?

or Remote, Geographically Dispersed, Far Flung, Telecommuting Team?

Virtual (and Remote) Team Definition

A virtual/remote team (or geographically dispersed team) is a group of individuals, with a common purpose, who work across time, space, and organizational boundaries with links strengthened by collaboration technology.
Virtual & Remote Teams/Organizations
The Business Case

Table Talk
• Why are these type of teams so important?
• Why is the move to virtual teams and organizations accelerating?

Why Virtual or Remote Teams?
Enable Globalization of Work

• A Dow Chemical team rolls out a global process in 1/5 the time with 100% buy-in and no travel (saving $200K+) while bridging the interests of 132 sites, 12 languages and operating with 40% fewer people
• SAS transformed their dispersed organization’s $20 million loss into $55 million gain in 1 year by re-aligning people globally
Why Virtual or Remote Teams?

Increase Productivity

- American Productivity & Quality Center reported a 15%-48% productivity increase by virtual teams
- Maryland Department of Transportation reported that Teleworkers were 27% more productive than office staff

Why Virtual or Remote Teams?

Save Time and Money

- An 18 member virtual team at Lockheed-Martin:
  - saved $5 million
  - made decisions with 100% consensus
  - got results in 1/5 the time
  - spent $0.00 on travel
- Teams at Boeing used technology to shorten project time by 90% and involved everyone in process to design Boeing 777 aircraft
### Why Virtual or Remote Teams?

**Support Social Responsibility**

Lister and Harnish (2010 – USA & 2011 - Canada) estimated the following savings per year if eligible workers telecommuted 50% of their time in the U.S.A. and 40% of their time in Canada:

<table>
<thead>
<tr>
<th>Stakeholder</th>
<th>U.S.A.</th>
<th>Canada</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business</td>
<td>$436.8 Billion</td>
<td>$44.4 Billion</td>
</tr>
<tr>
<td>Employee</td>
<td>$171.7 Billion</td>
<td>$8.5 Billion</td>
</tr>
<tr>
<td>Community</td>
<td>$36.7 Billion</td>
<td>$0.5 Billion</td>
</tr>
<tr>
<td>Total</td>
<td>$645.2 Billion</td>
<td>$53.0 Billion</td>
</tr>
</tbody>
</table>

In 2009, as part of their Green Plan, the Ontario Public Service reported reducing travel by 30% through webcasting and videoconferencing.

December 9th 2010: President Obama signs the Telework Enhancement Act requiring agencies to establish policies, determine eligibility and notify all workers about their eligibility for telework within 6 months.
Why Virtual or Remote Teams?

Increase Employee Satisfaction

- Since Sun Microsystems introduced "Open Work" to allow workers to work from wherever they wanted to, average productivity is up 34%; by 2007, over 50% worked remotely
- A Conference Board Survey reported that 25% of employees would change jobs if they could work from home with no change in pay or benefits

Why Virtual or Remote Teams?

Enhanced Customer Satisfaction

- Exceptional virtual teams develop extraordinary capabilities in dealing with their customers virtually and enhanced customer satisfaction
OD Professionals and Virtual Teams

Table Talk

- What unique value can OD offer to help virtual teams and organizations?

Challenges for the OD Professional

1. Understand and master the new online collaboration technologies

- Cisco Webex
- Yahoo! Groups
- YouTube
- LinkedIn
- Huddle
- Twitter
- Doodle
- Facebook
- Adobe Connect
- Microsoft Office 365
- GoToMeeting
- Google Docs
Challenges for the OD Professional

2. Master electronic community building

- Social Media
- Discussion Groups
- Intranets
- Newsletters, eCoffeeTalk
- Web collaboration tools
- Engagement activities

- Core change team ~20 people
- Project team ~800
- Core users ~ 20,000+
- Whole organization 100,000+

Challenges for the OD Professional

3. Bring OD values, knowledge, approaches, skills & tools to virtual teams & organizations

Key Elements of Effective Teams

Adapted from Richard Beckhard (1960, 1971)
Consulting with Virtual Teams & Organizations: Level of Intervention

**Team Effectiveness**
- Goals, Roles, Processes, Relationships, Collaborations, Technology
  - Observation
  - Interviews
  - Assessment
  - Education/Training
  - Facilitation
  - Coaching
  - Technology support

**Leader/Manager Effectiveness**

**Individual Team Member Effectiveness**

**Organizational Effectiveness in Virtual Space**
- Organizational Assessment
- Collaborations with other teams
- Business Case
- Collaboration technology tools & support
- Virtual work policies & procedures
- Remote management & leadership development
- Remote work capability development
- Selection criteria and processes for remote workers & leaders
- Change Management
- Project Management

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Consulting with Virtual Teams & Organizations: Team vs. Organizational Intervention

**Leaders remote management capability**

**Team member virtual work capability**

**Team member collaboration tools capability**

**Team member work space**

**Hoteling space**

**Meeting space**

**Collaboration tools availability**

**Collaboration tools infrastructure & support**

**Leadership**

**Strategic Direction**

**Structure**

**Processes & Policies**

**Technology**

**People Culture & Values**

**Virtual or Remote Team**

**Organizational goals**

**Business drivers for virtual work**

**Where the team fits in the organization**

**Interdependence and collaboration with other teams**

**Telework policies**

**Social Networking policies**

**Project management discipline**

**Recruitment & selection of remote workers & leaders**

**Performance Management processes**

**Performance Management processes**

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Virtual & Remote Teams gone bad

"I work in a location with 100 other people ……

Virtual and Remote Team Challenges

I can’t let you telecommute because then I wouldn’t be able to manage you.

You’re managing me right now, and all it’s doing is preventing me from working.

And your point would be …?

Just beyond your grasp.

Licensed from:
http://thedilbertstore.com/comic_strips/1997/3/12/products
Removed from Handout – for presentation only
## Virtual and Remote Team Challenges

**Goals, Roles, Processes, Relationships, Collaborations**

*plus the following 11 success factors*

1. Leading with shared purpose, vision and goals
2. Developing measurable accountabilities and deliverables
3. Building and maintaining Trust
4. Communicating & providing access to information
5. Providing timely feedback
6. Creating a “sense of Team”
7. Using Travel effectively: “Travel for Trust”
8. Making Cultural diversity an advantage
9. Orienting New Team Members
10. Developing team norms & operating agreements
11. Mastering collaboration technology

## Case Study: Software Development Team

**The Software Development Team...**

- Their goal was to develop and bring to market a new software product, on time and on budget
- The core team was dispersed geographically across Canada
- Extended team members were located globally in different time zones

**The Virtual Team asks for HELP...**

- The project started well, with clear goals & roles
- The deadline was in peril
- Teams members had limited experience working virtually
- Team members had different ways of working
- Collaboration was difficult
Building Team Effectiveness Process

**Contract**
- Assessed progress
  - Assess team operation agreement practice
  - Reassess effectiveness
- Contract with team and/or leader
- Assess team current state
  - Online assessment
  - Individual team member interviews

**Feedback/Analysis**
- Feedback to team
  - Confirmations/Surprises
  - Team strengths
  - Development opportunities
- Assess team current state
  - Online assessment
  - Individual team member interviews

**Interventions**
- Plan intervention or contract next steps
- Consulting with a virtual team
- Development Priorities
  - Agree on top development priorities
- Desirable State
  - Develop team vision for the future

**Follow-up**

Case Study: Software Development Team

Assessment Results

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Effective Virtual Teams
Phases of Development

Phase #1: Disabled

Phase #2: Connected

Phase #3: Peak Performing

Inspired by: Bionic eTeamwork by Jacklyn Kostner, 2001

Effective Virtual Teams – What Phase is your team?

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<thead>
<tr>
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<th>Peak Performing</th>
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<tr>
<td></td>
<td>Technology used to enhance human processes</td>
<td>Improving feedback and alignment</td>
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<td></td>
<td>Exceptional Communication plan &amp; execution</td>
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<td>Software Development</td>
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<td>Team was “here” X</td>
<td>Face-to-face meetings on things could do remotely</td>
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<td>Heavy Travel</td>
<td></td>
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<tr>
<td></td>
<td>Uncomfortable</td>
<td></td>
</tr>
</tbody>
</table>

Awareness Understanding Acceptance Adoption Sustain

Case Study: Software Development Team

Team Strengths (to acknowledge/celebrate)

The assessment revealed that the team was relatively effective in the following virtual team critical success factors:

- Leading with shared purpose, vision and goals – they had a clear and precise vision of the final product
- Developing measureable accountabilities and deliverables – they were highly skilled and disciplined in product development
- Providing timely feedback (especially about the project content)
- Creating a sense of “Team” – they shared a passion for the product they were producing
- Making cultural diversity an advantage
- Orienting new team members

Case Study: Software Development Team

Development Opportunities

The assessment revealed that the team WAS AT RISK if serious attention was not paid to the following critical success factors:

- Developing team norms & operating agreements
- Building and maintaining trust
- Using travel effectively: “Travel for Trust”
- Mastering collaboration technologies
Team Effectiveness Assessment
Elements of Effective Teams

- **Goals:**
  - shared focus of team purpose, vision, and objectives

- **Roles:**
  - mutually understood contribution of each team member expected towards achievement of its goals

- **Processes:**
  - clear agreement how to work together: meetings, planning, problem solving, decision making, dealing with conflict

- **Relationships & Values:**
  - established links binding individual team members: communications, trust & openness, participation, etc.

- **External Collaborations:**
  - clearly defined relationships, commitments and shared vision between the team and the rest of the organization, partners and customers

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Virtual and Remote Team Challenges

**Goals, Roles, Processes, Relationships, Collaborations plus the following 11 success factors**

1. Leading with shared purpose, vision and goals
2. Developing measurable accountabilities and deliverables
3. **Building and maintaining Trust**
4. Communicating & providing access to information
5. Providing timely feedback
6. Creating a “sense of Team”
7. **Using Travel effectively: “Travel for Trust”**
8. Making Cultural diversity an advantage
9. Orienting New Team Members
10. Developing team norms & operating agreements
11. Mastering collaboration technology
Using travel effectively

Table Talk

• What are some things we tend to do in face to face meetings that could be done as well or better remotely?
• What are some things we try to do remotely that are more effective face to face?

Travel for Trust

– To build human connection on all levels
– As an “investment” in team collaboration and building trust

Don’t travel to “present information”

When face-to-face

– Do things that cannot be accomplished remotely
– Build shared vision, discuss, dialogue, debate strategy and approach, enhance relationships
Building and maintaining Trust

- How would you define Trust?
- What actions or personal characteristics do you feel inhibit the development of trust on a team, especially a virtual or remote team?
- What actions or personal characteristics build or promote the development of trust?

Building Trust Commitments

<table>
<thead>
<tr>
<th>Trust Factors</th>
<th>Behaviors and Practices</th>
<th>Assessment</th>
<th>Commitment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Goals:</td>
<td>Document &amp; Deliver on:</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Commitments</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Results</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Roles</td>
<td>Ensure roles are:</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Clear</td>
<td></td>
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<td></td>
<td>• Agreed to</td>
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</tr>
<tr>
<td></td>
<td>• Committed to</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Processes</td>
<td>Communicate and keep everyone informed:</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Gain agreement on processes of how the team will work when face-to-face, when virtually together, when working independently</td>
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</tr>
<tr>
<td></td>
<td>• Follow processes or gain agreement to change</td>
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<td></td>
</tr>
<tr>
<td>Relationships &amp; Values</td>
<td>Develop strong relationships:</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Clarify your values</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>• Stand up for your beliefs</td>
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<td></td>
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<td></td>
<td>• Display integrity with actions</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Be aware of your impact on others</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>• Support the team and team members</td>
<td></td>
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</tr>
<tr>
<td>Collaboration</td>
<td>Integrate:</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Team partner &amp;</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Customer needs</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Team Norms and Operating Agreements

Handout: Activity 6.1: Defining our basic operating agreements

Behavioral norms:
Define how you will treat each other, tend to be more values based and define who you want to be as people, e.g.

- Everyone participates & has a voice – leave hierarchy at the door
- Listening is different than waiting to speak
- When you disagree, invoke the “law of 3”
- Surface “dead moose”

Tactical team operating agreements:
Day to day process agreements on how to function with technology, meeting protocols, e.g.

- Start/end all meetings on time; “be present” for the entire meeting
- Use: Action Requested by dd/mm – in subject line for all requests to others for input, feedback or document review

Table Talk

Your table “team” has just agreed to work virtually together over the next month on an article for the ODN Practitioner....

Tables on left side of room

- Identify 3-5 “Behavior Norms” you feel are needed for your “team” to work effectively together

Tables on right side of room

- Identify 3-5 “Tactical Operating Agreements” you feel are needed for your “team” to work effectively together
- How will we hold one another accountable?
Case Study: Software Development Team

Team norms and operating agreements

- Documented how they would work together and interact
- Set basic norms for team and individual behaviours
- Implemented a decision making process
- Reviewed and revised monthly at “in person” meetings

Collaboration Technologies

Early 1800’s – The Telegraph

“Victorian Era Internet”

1876 – The Telephone
Collaboration Technologies

1960’s – Mainframe Computers

1980’s – PC’s, E-mail & Voice Mail

1990’s - The Internet

21st Century - Mobile Access
The team was next challenged to master collaboration technology

<table>
<thead>
<tr>
<th>Space</th>
<th>Audio Conference</th>
<th>Video Conference</th>
<th>Texting/Instant Messaging</th>
<th>Web Collaboration Tools</th>
<th>Web Sites</th>
<th>E-mail/E-newsletter</th>
<th>On-line Blogs/Wikis/Surveys</th>
<th>Discussion Forums</th>
<th>Shared Online Workspaces</th>
<th>E-Mail/Calendars</th>
<th>Filing Cabinets</th>
<th>Poster boards</th>
<th>Polling/Voting Charts</th>
<th>Suggestion Box</th>
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<tbody>
<tr>
<td>Different</td>
<td></td>
<td></td>
<td></td>
<td>Presentation, polling, document editing, white board, applications</td>
<td></td>
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<td></td>
<td></td>
<td>(calendar, files, project mgmt.)</td>
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<tr>
<td>Same</td>
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<tr>
<td>Time</td>
<td>Slide Presentations</td>
<td>Flip Chart/Whiteboard</td>
<td>Agenda Management</td>
<td>Decision Support</td>
<td>Meeting Systems</td>
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<td>Suggestion Box</td>
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<tr>
<td>Huddle</td>
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Effective Virtual Teams – Making Progress

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<td>Face-to-face required for collaboration</td>
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</tr>
<tr>
<td>Trust diminish with distance</td>
<td>Face-to-face meeting</td>
<td>One-on-one remote collaboration feeling better</td>
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<tr>
<td>Frustration with the technology</td>
<td>“Show &amp; tell” online meetings</td>
<td>Delay Decisions</td>
</tr>
<tr>
<td>Feel “out of the loop”</td>
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Software Development Team evolved to “here” X
Case Study: Software Development Team

The Outcome

- The team built trust, lived their operating agreements and are now masters of collaboration technologies
- The software was delivered on time with unmatched quality
- Millions of copies have been sold world-wide
- The team still meets virtually weekly and once/year in person for new ventures

In future, we can expect immediate access to:

- Anyone
- Anything
- Anywhere
- Anytime

….. at very low cost
Collaboration Technologies

But we must evolve how we as individuals, teams and organizations:

- Communicate
- Collaborate
- Build relationships
- Work together
- Use technology
- Sustain our planet

“Anyone who thinks the future is going to be anything less than amazing will be foolish. The most difficult part of the future, will be figuring out the new rules.” – Mike Jay

To summarize….

Effective Virtual Teams and Organizations

- Collaborative
- High performing
- Dispersed
- Productive
- Satisfied
- Efficient
- Networked
- Fluid
- Diverse
- “Green”
What’s next?

You are invited to a highly collaborative online experience

- Experience the tools the software development team used
- Join a discussion group on virtual teams and organizations
- Participate in a highly interactive virtual workshop (Not your grandma’s webinar)
- “Doodle” a time that works for most of us

You are invited to participate …

Please provide name, e-mail and phone # (or business card).

We will use “Doodle” to let you vote:

**Dates:**
- Nov 16th, 17th, 22nd or Dec 5th

**Times:**
- 7:30-9:00 p.m. EST (4:30-6:00 p.m. PST), or
- 9:30-11:00 p.m. EST (6:30-8:00 p.m. PST)
Building Effective Virtual and Remote Teams: An OD Perspective

Q&A

Speakers

Jon Wagner (BASc., MASc.) has provided high-impact OD/HR private and public sector consulting internationally for 35+ years including holding senior HR, OD and Change Management roles at Hewlett Packard, Agilent Technologies, Oracle, Alcan and the Ontario Public Service. As a pioneer in working virtually, Jon has led, supported and researched virtual teams for 20+ years. He has developed and delivered team and organizational effectiveness assessments, workshops, highly interactive webinars, and interventions for global/cross-cultural teams. He leads large-scale change projects and organizational transformations. Jon is President of J Wagner Consulting Inc. and Managing Director of VirtualeTeams (www.virtualeteams.com).

Russ Milland (BASc., MASc.) has over forty years of cross-industry experience working in senior roles in major companies such as Imperial Oil, Allied Signal Aerospace and Canada Life Assurance. He has also worked with many smaller businesses in consulting roles. His primary areas of expertise are in business design and optimization, organizational transformation and delivery of technology-based systems solutions. Russ passionately believes in using cross-disciplinary virtual teams and supporting technologies to maximize the probability of success in major transformational change projects. Russ is President of 7BY24 Enterprises Inc. and a Partner at VirtualeTeams (www.virtualeteams.com).