



QRCA *IDEAS & TOOLS  
FOR QUALITATIVE RESEARCH*

# VIEWS

SUMMER 2010  
VOLUME 8 • NUMBER 4

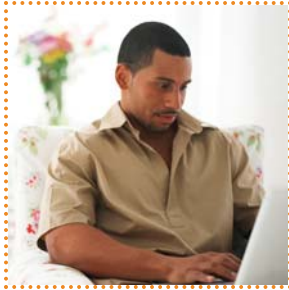
Understanding  
MROCs (Marketing  
Research Online  
Communities)

Drawing Ethical  
Lines in Competitive-  
Intelligence Research

Building Engagement  
on Discussion Forums  
with Talking Avatars

MEANINGS,  
METAPHORS  
AND MAPS:  
THE POWER OF THE  
VISUAL SUMMARY





# *Grow Your Business with* VIRTUAL TEAMS

BY KAY CORRY AUBREY

Usability Resources Inc. ■ Bedford, MA ■ [kay@usabilityresources.net](mailto:kay@usabilityresources.net)

Virtual teams are a good way for you to take on bigger projects, reach out into new markets and offer outstanding value to your clients.



**I**t has become so common that we scarcely notice anymore: computers, inexpensive telephone service and the internet allow many of us solo professionals to run complex full-service qualitative research operations out of our home offices. We partner ad hoc with others whose expertise complements our own, and we stay in touch largely via electronic communications. This kind of “virtual” work arrangement is, for many of us, just the way we do business. And for good reason: this model offers small businesses unique opportunities for growth with very low investment.

This article covers practical tips and best practices on how to create thriving virtual teams. I am focusing on the type of ad hoc groups most of us work within — small teams (no more than five people) of equals who know one another and come to work together on a project basis. I gathered the advice below from interviews with 14 people from my LinkedIn network who have extensive experience in either leading or taking part in virtual teams. Several are QRCA members; others are consultants from other industries, high-level managers and virtual company owners.

## Working Virtually Offers Compelling Advantages

Working virtually offers so many advantages — companionship (albeit mostly by electronic means), low overhead and access to a large pool of people with very specific skills that you can match to the needs of a particular project. As Susan Saurage of Saurage Research remarks, “You get a better mix of talent, and the client expects it. I dip into my network of 18 people with specific talents on whom I can rely — qual, quant, web evaluation, segmentation strategy — and people who have these skills, plus who know my industries. I want to draw on the right



people when I need them, but I do not need them 40 hours a week. QRCA has been wonderful in helping me find the right people.”

If you are a solo practitioner, being part of a network of people with whom you have good working relationships allows you to expand your operation when a really big project presents itself. Lisa Figlioli, a solo public relations consultant in Cos Cob, Conn., scales her business up as needed by tapping into a network of colleagues she has worked with for over a dozen years. “It’s all very loose,” she says. “We are all sole proprietors, mirror images of each other. When an opportunity comes my way, I get a sense of what the project might be, I choose my people, and we pitch together as though they work for my company.”

### The Cornerstone of a Virtual Team Is Picking People You Like and Trust

It takes effort to set up a virtual team that can present itself as a cohesive unit. According to Dr. Aline Yurik, who founded the master’s program in virtual team management and communications at Brandeis University, trust is a key factor in determining team success. “People on virtual teams can work together for years and never see each other, yet they have forged deep and trusting relationships,” she says. “In any work situation, we develop trust when we find similarities between ourselves and others, by doing things together, by being responsive, by completing tasks on time.”

Many partnerships last for years, like marriages. Liz Van Patten of Van Patten Research notes that it took time for her to find the people who were right for her. “Choosing business partners is a lot like picking your friends,” she comments. “It’s like gold when you find someone you work well with; everything flows so smoothly. I like to get to know the person on a trial basis, shoulder to shoulder, to gain some history and see if we understand each other’s personal style. I need to know if I can work with them.”

Susan Abbott of Abbott Research agrees that human relationships trump everything else when it comes to choosing virtual teammates. “I have to like and trust the person,” she states. “If I can’t find people I like, I don’t bid. You need to find partners who share your values, and it is really important to talk about these values upfront.”

### Use Your Moderator Skills to Find Good Partners and Run Well-Oiled Teams

Finding the right business partner is like a research project. Look for highly experienced people with distinct skills who can function independently. Liz Van Patten recommends that you “write down the things you are concerned about, what matters to you, and use these questions to guide your initial conversation.”

Once you have chosen your teammates, spend time learning about one another and building the relationship, maybe by working together on a smaller project. Susan Abbott’s approach is also very much relationship-driven. “I want to know the type of work they enjoy and what

they are really good at,” she says. “Sometimes we build goodwill by mentoring: you back me up, and I will share with you what I know about online research.”

Small teams work best, and ideally people should already know each other before they start working as a virtual team. To minimize coordination headaches, each person on your virtual team needs a unique and clearly defined role, as well as a set of deliverables for which to be responsible.

Even on a team of equals, you need a leader. This person is usually the one who closed the project sale and assembled the group. The team leader is responsible for coordination and serves as client interface and traffic cop. The virtual team leader must have the people skills to ensure that high-quality work gets done on time without coming across as a micromanager. Tasks and deliverables need to be broken into small enough chunks, and the leader needs to hold someone responsible for each one. The leader also needs to keep in continuous contact, perhaps by talking with each person on the team every day to ask how things are going. The leader serves as the “glue”



## TOP 10 TRICKS FOR SUCCESSFUL VIRTUAL TEAMS

1. Pick teammates you know, trust and like and who are committed to the success of your project.
2. Select highly seasoned people who can work independently and deliver quality work without being prodded.
3. Do a test run with a new potential partner by working together on a smaller project.
4. As you compose your virtual team, each person should have a clearly defined role, to avoid coordination headaches. Some overlap is good so that you can fill in as needed.
5. Break larger deliverables down into smaller chunks, and check in with team members regularly to make sure they are on track.
6. Get everyone to sign off on “rules of the road” that define how your team will communicate with each other.
7. Hold weekly check-in meetings with your team.
8. Detect conflict early and deal with it.
9. Try to meet in person with your client and team at least once during a project.
10. Practice your presentation (including technology) before giving it to your client.

for the team: keeping everyone on track, establishing norms and guiding interactions.

Deliverables should flow through the team leader for review before they are sent out to the client. Susan Abbott remarks, “As the project leader, I always tell people what I need, when I need it and in what format. I always build time into the schedule to fix anything I do not like before sending the deliverable to the client; for instance, I’ll set a Tuesday deadline for a Friday deliverable.”

The more-established virtual teams follow style guides and templates. At the outset of a project, the team should also insist on getting clear requirements from the client, as well as a statement of work and a formal change-control process. And as in any project, you need to manage client expectations aggressively.

### Maintaining Open Communication and Group Cohesion Takes Time

Even small teams need infrastructure to operate smoothly. Rituals help. For example, you might have a weekly phone huddle to touch base. It is always a good practice for everyone to contribute to a weekly status report that is sent to the client. The process of pulling together a status report allows team members to regularly evaluate their performance, measure their progress against the schedule and clear up conflict and misunderstanding.

In the physical work environment, we spend a lot of time understanding and interpreting the social environment and norms of the people around us. In a virtual environment, “you need to put all of this on paper,” advises Kyra Cavanaugh,

owner of Life Meets Work, a company that trains organizations in how to transition workers to virtual environments. Kyra recommends virtual team members sign off on a set of “rules of engagement” that formalize how the team communicates.

For instance, everyone might agree that after two emails on a particular subject, the parties need to pick up the phone. Another rule might be that the subject lines of all team emails have a set format: “Review: proposal xyz.” These little things go a long way toward saving everyone’s time, minimizing conflict and facilitating clear communication.

### Detect Conflict Early, and Deal with It Immediately

It is crucial for virtual teams to have an early warning system to detect and address conflict. Pay close attention to changes in writing tone, communication patterns and other behavior to detect conflict and emotion. Changes in behavior — a member stops responding to IMs or emails, shows up late for meetings or starts sending in flat single-page status reports instead of lively three-page memos — may signal trouble. Aline Yurik advises, “Notice any changes in behavior or attitude. You need to bring conflict to light, even more so on a virtual team because people don’t see each other.”

When you suspect problems, call the person and hear him out. Identify the people involved and engage in a positive open-minded talk with each party. Tell them you are sensing tension and invite them talk about their concerns. Once you understand these and have discussed possible solutions, arrange a meeting to resolve the conflict.

### Technology...

#### You Need More than Email

My interviewees describe a range of inexpensive or free tools as “indispensable” for virtual teams: WebEx, Google Docs, Doodle, BaseCamp and Tom’s Planner. Virtual teams need internet-based project-tracking technologies such as “to do” lists, a team calendar, contacts, milestones and customer notes. Teammates should be able to log into this system at any time to see what others are working on, what progress they are making, what they are talking about and what help they need. Online project-tracking systems also cut down on email.

On the other hand, some teams thrive with limited technology. Anne Tobin’s human resources company, Tobin Connex, is totally virtual. She stays in continuous contact with her consultants and clients via the phone and face-to-face communication. “My business is all about relationships and proving your value,” she says. “I need to make sure I have up-to-date information on my clients so I can do the HR work they require. Managing a virtual team requires a lot of follow-up on my part. I regularly attend customer staff meetings. I am able to keep a lot of balls in the air.”

#### Your Rolodex Is Your Gold

It is difficult to have a virtual business without many contacts, both vendors and partners. You need to be established in your field. Paige Arnoff-Fenn’s virtual marketing firm, Mavens & Moguls, has been featured in two *Harvard Business Review* case studies. Paige also feels she is essentially in the “relationship business.” She spends most of her time traveling to meet with customers, networking and generating more leads and business. “Once you have a seat at the table and have their trust, you see all your customer’s problems,” she points out, “and this opens up even more opportunities. In today’s climate, your real asset is your Rolodex, your relationships; this is the gold.”

Changes in behavior — a member stops responding to IMs or emails, shows up late for meetings or starts sending in flat single-page status reports instead of lively three-page memos — may signal trouble.



Virtual teams should meet before a presentation — to transfer knowledge, get their messaging aligned and practice.

### Virtual Client Management

How do you make sure your virtual client relationships work well? Some virtual teams get into trouble because they fail to make clear to the client the team's chain of command or to explain each member's role. Bonnie Cooper oversees complex projects for the Massachusetts Medical Society. Her first piece of advice to virtual teams is to make sure your client understands how your team is organized. Bonnie recommends that you tell them, "Here's who we are, here's how we operate, here is our escalation path, and this individual is responsible for your project." You need to give them a context." All communication should flow through the designated team leader, who should also have the ability to triage client needs and get a quick response to them.

A lack of business systems can be another area of weakness for virtual teams. "So often, I need to spend time learning a vendor's systems, which is time-consuming and frustrating," Bonnie says. The virtual team should have business systems that allow them to track their work, know where things are and get a quick and accurate status of where things stand against the Statement of Work.

Presentations can be another area of challenge for virtual teams, especially if members are working independently and do not check in with one another in their analysis and reporting. Bonnie works with vendors who have lots of virtual team members (both employees and consultants), and they don't all take time to be sure that everyone is on the same page. "You can tell quickly when the team has not

# MEET YOUR NEW NAVIGATORS.

If your destination is a venue in which to conduct successful focus groups on consumer products, advertising and concept testing – meet your new navigators. Decision Drivers can take you there – with no detours and a smooth ride.


With Decision Drivers at the wheel, all your market research needs, including facility services, field management, screener creation and moderation are road mapped and ready to roll.

As an owner-operated facility, we are personally driven to providing each and every client with an exceptional journey.


When you need market research to help drive your product or service, let Decision Drivers navigate your way.

*We'll drive you to success!*

**NAVIGATORS:**



**Chris Driver**



**Jodi Lechner**

**Phone:** (201) 391 0073  
221 West Grand Ave  
Montvale, NJ 07645

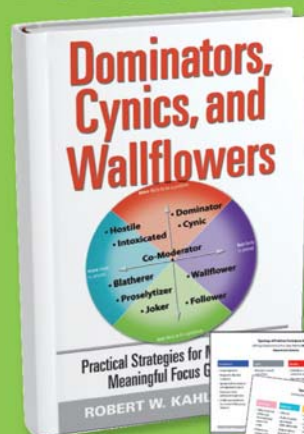
**DECISION DRIVERS**

[www.decisiondrivers.com](http://www.decisiondrivers.com)

## Get MORE Out of Your Next Focus Group

Don't be frustrated by runaway focus groups! **Dominators, Cynics, and Wallflowers**

—Bob Kahle's field guide to the misbehavers—can help you recognize 10 basic bad actors and give you the tools to quickly neutralize their hijinks. Look for this and PMP's other best-selling books about moderating techniques, reporting, and screening at our convenient online bookstore.



Includes six-card companion tool kit.



**PMP**

Practical books for smart professionals  
Paramount Market Publishing, Inc.  
[www.paramountbooks.com](http://www.paramountbooks.com)

Call 888-787-8100 for special quantity discounts.

prepared as a group,” she says. “They stumble, they disagree, hand-offs are not smooth, and they do not seem to be paying attention in a virtual way. Teams need time to deliberate so they have a unified voice.”

Virtual teams should meet before a presentation — to transfer knowledge, get their messaging aligned and practice. Particularly in the realm of presentations, “the virtual element exacerbates any issues,” Bonnie says. As they practice, the team should also test the technologies they plan to use. On the day of the meeting, it is a good idea to convene at least a half an hour before the actual meeting to make sure everything is set up and working; even a bad phone connection will throw everything off.


Another area of challenge is staying in tune with the client’s mindset. To Debbie Falck, a graphic and user-

interface designer, there is always a risk that things will get lost in translation when she works virtually with people who do not understand her expertise. To prevent this, when starting up with a new client, she and her team schedule a kickoff meeting where they walk through a full-blown design exercise. The meeting gives everyone a chance to get to know one another. This initial meeting also provides an opportunity for “group therapy,” where clients can voice frustration with their product’s appearance and usability.

There is such a thing as being too virtual. When she can, Debbie likes to be physically present at key points in a project, such as initial design reviews. “The worst thing is to be talking about visual issues remotely, and you have no idea what they see on their end, for example with color shifts,” she comments. Further, you

don’t have the chance to pick up on the nonverbal communication going on in the other end. You don’t see people’s facial expressions (who looks discouraged, who is making eye contact). “Sometimes this is just unavoidable,” she says. “I have clients whom I have never met, and it has been fine. But they have a sophisticated sense of visual design and the design process, and they shield me from the internal politics of the work we are doing.”

Using virtual teams to build your business will not be without challenges. But it represents a good way for you to take on bigger projects, reach out into new markets and give outstanding value to your clients.

For summaries of all the interviews I conducted on virtual teams, please visit [www.virtual-team-success.com](http://www.virtual-team-success.com). 



**FOCUS**Forward  
Transcription Services

**215.367.4000**  
[transcript@focusfwd.com](mailto:transcript@focusfwd.com)

## the experts in market research transcription

**Now offered in  
125+ facilities  
nationwide!**

[www.focusfwd.com](http://www.focusfwd.com)

Your clients don't like to wait and neither do you! With turnaround in as few as 24 hours and straightforward pricing, Focus Forward is emerging as the leader in global transcription services.

To ensure the highest quality standards, every completed transcript is audio checked and proofread. Available 7 days a week, you can relax as our team of 200+ US-based transcribers expertly handle your project.

**No job is too large. On time, every time.**