
Going Virtual: Modern Management Tools for Bringing Mission, Manpower, and Money Together in a New Economy.

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The Challenge

As 2009 moves into its last quarter and economic signs indicate a slow recovery from the first major market crash in decades, many nonprofits are beginning to reflect on their roller coaster year. Most organizations in that moment of reflection are cautiously setting their sights past immediate crisis-management and are beginning to look ahead toward assessing and managing their workforce and mission in a new financial landscape. Some nonprofit organizations have continued to thrive in 2009, supported by stable relationships and grants or stimulated by the Obama Administration's efforts to reinvigorate service to populations in need. Others have delivered painful cuts to their operational revenues through staffing layoffs and still others have had to close their doors entirely. Whether thriving or struggling, however, it is clear that the effective stewardship of organizational funds has never before been more important to the nonprofit sector.

In times of uncertainty, organizations are often more willing to experiment with new ways of doing business. In our current era of financial uncertainty, many nonprofits and for-profits alike have begun to explore using new 'virtual' technologies to manage their teams in a way that is at once inexpensive, effective, and supportive of a diverse and engaged workforce. Nonprofit Professionals Advisory Group has been a virtual firm since its inception over seven years ago and over the last three years has been active informally counseling organizations who are exploring the new virtual frontier about the lessons we have learned and continue to learn about using new technologies and business practices to marry mission, manpower, and money in both creative and highly effective ways.

THE NEW ECONOMY LANDSCAPE

New technologies have created a new reality for the nonprofit world over the last ten years. Things once cost prohibitive, like international calling or video conferencing, are increasingly available at trivial or no cost and are becoming a part of our day-to-day existence. Voice over IP

technologies are making international communication indistinguishable from interoffice phone calls. Web forums, podcasts, and shared meetings spaces are making information easily accessible in real-time to colleagues all over the world, and social networking sites are engaging millions upon millions of mission-driven individuals in new causes every day with minimal marketing effort. This virtual frontier with new, ever-expanding, and inexpensive access is also critical to the development of the sector's next generation workforce. Younger members of the workforce are increasingly savvy and familiar with the use of technology to maintain social and professional networks and many of their managers are discovering that the introduction of virtual teams and tools can be a creative and innovative way to bring mission and manpower together in a way that is both cost efficient and user friendly. However, even skilled managers can be in new territory when introducing virtual tools to their workforce.

For organizations venturing into the virtual world for the first time, the information, tools, and challenges can be overwhelming. A good starting point for

soon-to-be virtual managers is an assessment of capacity both from an employee and technological point of view. Does each member of the team have personal access to a computer? Does everyone already know how to use basic communication tools like e-mail and conference calls effectively? Certain qualities of an organization, or of a level in an organization, can make it particularly well-suited to the use of virtual tools. For example, high-functioning, technically-savvy, and independently-driven individuals thrive in a virtual space whereas individuals who need a great deal of oversight or technical support may not. Assessing capacity can help managers set an effective strategy for introducing virtual tools that can increase efficiency, productivity, and connectedness while positively impacting the bottom line for the organization as a whole. Regardless of the characteristic of the workforce and the state of technology, however, mindful managers through attention to the individual and group dynamics of their virtual team, the careful selection of tools for communication, the articulation of rules for engagement, and the regular reinforcement of the team's mission and each members' role toward achieving that mission can help make virtual teams more effective.

THE FIRST STEP: ASSESSING THE TEAM

A team – be it the whole or a part of an organization – best suited to a virtual work environment tends to be made up of individuals with a common set of professional and personal qualities that predisposes them to success in the virtual space. Specifically, individuals who find transition to virtual work invigorating as opposed to intimidating tend to be independently committed to a high level of work quality, understand the importance of maintaining a professional work environment wherever they spend their work hours, and are eager to embrace new technology as a tool for working smarter and better. They are sufficiently confident to be open to feedback about ways they can alter their day-to-day work patterns to help them work smarter and more successfully to

the benefit of the team. They are comfortable with ambiguity and, in the uncertain communication space that e-mail and instant messaging can create, they are able to parse out what issues might need to be addressed to ensure productive working relationships and what may be unintended or misconstrued virtual communication tones that can be chalked up to a bad day at the laptop. To be sure, much of this skill and comfort with communication ambiguity is acquired over time on the virtual job. Selecting a group of individuals with strong communications skills, who are quick to adapt to and adopt new ways of working and who are able to have direct and productive problem-solving conversations that leave egos at the door provides the most seamless route to transitioning from physical to virtual office infrastructure.

However, most organizations are not able to draw exclusively upon individuals who are ideally suited for the virtual work environment and instead must manage 'mixed' teams made up of some individuals who thrive in the virtual environment and some who struggle with the transition. Individuals who are naturally extroverted, for example, can find virtual work isolating and often seek out personal contact in excess of what might be required to complete a task. Others, who are not as comfortable with the use of technology or who need significant oversight in their work can find virtual work anxiety provoking. When managing 'mixed' teams, being mindful of the qualities of each team member that might lend toward success or frustration in the remote context is a good first step toward managing problem areas. Next, managers can work collaboratively with the team to educate on the use of tools and standards of behavior to help less tech-savvy or independent individuals develop more comfort with their new work environment. Finally, managers can offer the team common approaches to their work that bind them together and keep them moving in the same direction by articulating their common mission or goal in a way that draws them forward as a unified whole and reinforcing that commonality in meetings on a regular basis. The nonprofit sector's existing mission-driven nature makes the sector uniquely suited to galvanize virtual teams – particularly if managers ensure that

there are ways for staffers to connect regularly to reinforce their shared commitment to the mission.

THE SECOND STEP: FINDING YOUR TOOLS

The rise of the internet and its attendant social media tools as a way to co-create content has opened the door to a vast array of tools available to help connect people personally and professionally. Deciding which tools to use in a new virtual workplace can be overwhelming. However, if you are first clear on the desired outcomes or problems that will be addressed using the tool, then it becomes easier to make smart decisions about selecting appropriate tools. One way to think about the communication tools of an effective virtual environment is to compare the virtual office directly to a traditional work-place and the rooms in which effective communications traditionally take place.

The "Library"

Traditionally, organizations maintain a space in the office for data collection and/or shared resources for their employees. Most organizations today have already made the virtual transition to an online server or servers built for document storage. Servers are typically organized for and tailored to an office environment where document access and review is fairly transactional: template documents exist, are accessed and tailored for specific projects, and are saved in various drafts until a final version is complete. The content of the documents is discussed around the "bricks and mortar" office, and the knowledge included in the documents often rests in the ether as a result of conversations that capture only what is useful in that specific project context.

In a virtual office space, the "library" is not only important for data collection and shared access to resources, but also is a place where individual employees can see company activity, problem-solving, and progress beyond their specific team tasks. Without the typical bustle of activity in a physical office, the visual development of the library is often the virtual employee's only insight beyond all-staff meetings to organizational progress. In-person interactions are limited and phone content

related to projects is often much more limited to the task at hand. For that reason, a company intranet as elementary as a Wiki page or more sophisticated like a SharePoint site can be an incredibly important tool providing a visual-cognitive link beyond existing projects to the challenges the organization faces as a whole and new ways to solve them. Managers working with virtual teams can work collaboratively to identify the types of information important for shared access and discuss how to break that information down for easy day-to-day retrieval benefiting both specific tasks and broader cross-team or organizational insight.

The "Conference Room"

One of the most important rooms in the traditional office is the company conference room where employees can gather either in select teams, as a whole, or with outside clients and constituents to problem-solve around challenges, celebrate company successes, and articulate roles and responsibilities in a public space. Today, conference calls are a common substitute for the conference room. Previously an additional cost to organizations, many free conference call providers today are making the conference call an even more cost-effective way of bringing remote individuals together in a way that is a more efficient use of their time as well. Conference calls provide a deeper link to colleagues and co-workers than e-mail or voicemail messaging and enable individuals to gather in the same 'space' without expending the travel time to occupy the same physical space. However, meetings seeking to move an agenda forward often have information to review and next steps to be pursued once the call is over and can be limited by the exclusively audio format of the conference call. For that reason, web-based conference spaces that combine both the audio and visual information are increasingly used for more in-depth information sharing and content co-creation. These web-based conference areas can help maintain the meeting's momentum once the phone connection has ended. Even more creative users of technology have gone beyond a web-camera extension of conference calls, which add a further layer of visual connection, to building virtual

conference rooms in 3-D web-based worlds like *Second Life* and *There*. Supplementing these tools are instant message software, either separate from or built into the web-based conferencing software, which serve to ensure that key points aren't lost or to prompt co-workers to make a critical point that advances the conversation to deeper levels. Managers working with virtual teams should consider the level of complexity and depth of visual cues important to keep individuals engaged and productive during conference meetings in choosing tools that best suit their work challenges. Also, because important visual cues such as hand-raising or even nodding off are often missed in the virtual conference, managers can build in more deliberate opportunities for checking the 'room' such as soliciting feedback from individuals directly or asking each individual on the team to lead a portion of the call to ensure active participation.

The "Hallway" or the "Water Cooler"

The hallway in a traditional organization is both a place for casual superficial contact, such as a greeting, and a place where informal, but meaningful conversations about particular work issues might be broached. Some might argue that the greatest downside of the virtual organization is the loss of the informal information exchange. Without a physical space to inhabit, co-workers don't get a chance to pass one another in a hallway or run into each other in an elevator and have the brief but vital networking exchange that can catapult a temporarily stalled project over its present obstacle. However, in the traditional office-space, hallway or water cooler conversations can also be a huge distraction from the work tasks at hand and arguably can decrease the efficiency of a team's performance. Clever virtual organizations are beginning to find ways to recreate the hallway in ways that are both meaningful and maximally productive. Interactive social media tools that capitalize on the targeted support colleagues can provide each other can be an effective tool to build a virtual passageway for information exchange. One-way broadcast tools like Twitter can blast requests for advice across the organization or across an entire sector, while two-way tools like

instant messenger software can provide the real time, surgical strike Q&A without lengthy e-mail exchanges or telephone calls. Instant messenger programs have the additional advantage of displaying team participants visually logging into and out of a virtual space in real-time so that interactions can be as spontaneous as they would be in a traditional office environment. Managers of virtual teams should work to train employees to use common social media tools with agreed upon protocols. The risk in using social media with the virtual team is that some members utilize some tools while others do not and informal communication can as a result become more gossipy and personal than productive. Ensuring all team members are using the same tool or tools helps to build team cohesion and to avoid silos.

The "Lunch Room"

Every workplace needs a certain balance of personal and professional communication. Employees in contact with each other on a daily basis naturally build relationships to each other through their shared experiences and some level of personal communication and relationship is considered to be healthy for a workplace. Traditional office environments have gathering places like kitchens or lunchrooms where workers gather for meals or coffee that are naturally more predisposed to personal communication than more formal work spaces like conference rooms. Virtual teams interested in encouraging personal connections, however, must be much more deliberate about creating personal communication spaces and must therefore be more mindful of the appropriate lines between personal and professional in the workplace. Creating a company page on a social networking site like Ning or Facebook, along with space for personal blogs on a corporate intranet site, can help navigate the boundary between professional and personal lives in a fashion that reinforces the importance of professional conduct while helping staff members enrich their professional relationships. Some companies, like IBM, have also developed commonly agreed upon [social computing standards](#) for employees to both advance and manage the corporate

and individual expression opportunities and risks inherent in the use of social media. Because virtual teams are often significantly more cost-effective than non-virtual ones, managers can also utilize funds toward structured, but personal in-person gatherings such as dinners, happy hours, or volunteer events that might be time or cost-prohibitive in a traditional workplace yet serve to build personal relationship in the virtual organization.

THE THIRD STEP: ESTABLISHING YOUR "NETIQUETTE"

Etiquette in traditional organizations consists of the agreed upon 'rules of engagement' in the office and observing etiquette is an important way an outsider or a new employee can begin to understand the culture of the organization. Etiquette can be as explicit as a dress code or as subtle as an unspoken agreement not to broach conversation with someone who refuses to make eye contact. Without the interpersonal behavioral cues that we experience in-person, individuals who work in a virtual environment can feel like they're working in a "virtual void" when it comes to understanding what is expected of them in their interactions with co-workers and clients. Counter to the expectation that virtual employees do not need rules of engagement because of their isolated work environment, managers of virtual teams need to be more explicit than they might otherwise be in helping virtual teams to set a clear "netiquette", or behavioral expectations for how teams will communicate. Rather than arbitrarily setting these expectations, however, skillful managers can capitalize on an opportunity to build the team's cohesion by guiding team members through an iterative and collaborative process in which the mission of the organization and/or the goals of the specific project drive the creation of behavioral norms. For example, a small community development corporation might have a strong expectation for consensus building among staff, such that "Reply All" becomes the default e-mail reply option on most inter-office e-mail. A fast-paced advocacy campaign may ask that all staff be accessible by text message at non-traditional work hours to ensure rapid response time. The more explicit the

conversation about the organization's mission and how to efficiently use technology to advance that mission through behavioral norms, the smaller the "virtual void" becomes.

AVOIDING PITFALLS, BUILDING UP-SIDES

It can be easy for organizations to fix upon the downsides of remote or virtual work environments. Managers can fear losing touch with the pulse of the workforce and individuals working virtually can fear becoming isolated from their peers and colleagues, a possibility that can be exacerbated for individuals who gain energy by being around other people. Without intense work on the front-end crafting explicit communication and behavioral norms and a sensitivity to the tension that can be created in an ambiguous environment, employees who work virtually can get distracted by misread email or instant message tone or can let the silence of a virtual workspace amplify the "virtual void." Moreover, workers who need greater oversight can easily fall through the cracks while entrepreneurial individuals who are typically successful in the virtual environment can extend themselves beyond the bounds of current projects and lose focus on critical outcomes.

Organizations interested in exploring virtual team work can go a long way toward maximizing the benefits and reducing the risk of pitfalls by being mindful of these tendencies. Virtual managers who schedule regular check-ins with both individuals and the team to assess the health of the working relationships can often build their relationships to their employees while identify potential problems before they become toxic to the team performance. Also new territory for managers and their workforce, employee performance evaluations in the virtual environment often benefit from separate evaluation systems for job performance skills and skills related to the virtual environment to ensure the organization is able to retain individuals who bring much needed skill but might not be well-suited to the lack of structure in the virtual workplace.

If these pitfalls are managed well and a virtual bricks and mortar structure built to

link co-workers, virtual work arrangements can offer both organizations and their employees some extraordinary benefits. Allowing employees the opportunity to work out of a home office or otherwise remote location is not only attractive to many professionals who struggle to manage busy travel schedules and/or a balance between professional and personal life demands, but is also far less expensive for organizations that would otherwise pay premiums toward office space, furniture, and equipment. Organizations are able to expand virtual project teams nationally and internationally more quickly, seamlessly, and inexpensively than ever before. The virtual office is also helping to retain and reengage talented individuals who might otherwise have left a traditional workplace. Parents with young children, individuals caring for elderly parents, and trailing spouses are just some examples of workers who have historically made the decision to leave their traditional work environments for lack of flexible options that enable them to manage personal and professional priorities effectively. In the virtual office, these groups and more are finding new opportunities to attend to their families and communities while continuing to contribute in meaningful and important ways to the professional world.

The benefits of the virtual office are not limited to easily-measured cost-savings, employee retention, and increased worker satisfaction. The virtual office also has less tangible benefits. For example, the lack of a physical office can significantly reduce the impact of damaging dynamics such as inter-office politics. Communication in the virtual space is more functionally driven and is more connected to work outcomes since the process of typing an email or leaving a voicemail message can be just the pause one needs to reflect on whether sharing a piece of gossip or an angry comment is really worth the time it takes. Virtual work environments can also be ideal for people who are energized by independent work or who need the quiet of an isolated environment and selective contact with others to focus and move their work forward. Finally, reduced commute time also increases employees' available work-time while decreasing an organization's environmental impact. In short, contrary to

the assumption that supervision and face-time is the only way to guarantee a productive workforce, virtual work environments can and often do *energize* their workforce to achieve potential in both tangible and intangible ways.

In summary, the development of a virtual office can be an exciting opportunity for organizations facing the financial realities of the new economy. Bold organizations that are pursuing options for inexpensive growth or for reduced operational costs have not only the opportunity but also the incentive to lead the way toward mainstreaming virtual tools that marry mission, manpower, and money and create a new dynamic reality for tomorrow's workforce.



The Nonprofit Professionals Advisory Group offers training services to nonprofits and socially responsible businesses looking to develop virtual workspaces. Our team members are available to assess your organization's readiness to utilize various virtual best practices and will then create a custom program designed to meet your organization's needs and challenges. Our programs not only include materials that can help managers and their teams to think through various challenges and best practices, but also include facilitated discussions around common issues like effective virtual communications, team building across physical and electronic barriers, standards for professional remote work environments, and creating efficient and effective organizational culture in digital workspaces. For more information, contact Erin DeCurtis at edecurtis@nonprofitprofessionals.com.