



# LEADING FROM A DISTANCE

PRACTICAL TIPS FOR SUCCESSFUL VIRTUAL LEADERSHIP



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“Out of sight, foremost in mind.  
How do you manage people whom  
you don’t see regularly?”

~ Charles Hardy  
Harvard Business Review

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## Today’s Objectives

- Understand what you can do to improve the quality of your v-meetings.
- Develop strategies and actions to build and sustain trust in a virtual environment.
- Learn skills and techniques to effectively coach and manage accountability from a distance.

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### Chat with Us

What is your greatest challenge when leading from a distance?



*Please use your chat window to respond.*

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### Why Virtual Work is Different

- Infrequent or no face-to-face contact
- Difference in time zones
- Significant reliance on technology



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### Virtual Team Study

A total of 48 virtual teams participated in the study:

- 427 team members and team leaders completed the team survey.
- 99 stakeholders completed the team performance assessment.



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### Virtual Team Study

16 organizations from a variety of industries:

- Pharmaceuticals
- Financial Services
- Consumer Products
- Hospitality & Leisure
- Manufacturing
- Insurance
- Professional Services
- Telecommunications
- Technology
- Non-Profit




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### Key Findings

- **More than 25%** of virtual teams in the OnPoint study were **not fully performing**.
- MIT research found that up to **82% of virtual teams were not effective**.
- OnPoint found that **50% stakeholders** and about 33% of team members **rated their virtual leaders as less than effective**.




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### Key Findings

**Many organizations simply recycle** practices for co-located teams without really considering what makes virtual collaboration unique.




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**RAMP Model**

- Relationships
- Accountability
- Motivation
- Purpose and Process



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**RAMP Model**

- Relationships
- Accountability
- Motivation
- Purpose and Process

**Conducting Effective V-Meetings**



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**The Current State**

- 800% increase in virtual workers during the past 5 years.
- Use of virtual meetings has increased at 80% of companies.
- Only 62% of people are somewhat satisfied with the v-meetings they attend.
- 73% report “getting everyone engaged” and “multi-tasking” are always or often challenges.

Sources: Managing On Line Meetings Interaction Associates, 2009 and Effective Leadership in a Virtual Workforce ASTD, 2013.



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### Situation #1

Joan leads a team of 6 people who are geographically dispersed across North America, India, and Europe. Team members have recently been overwhelmed with work, and as a result, the team had to push back several deadlines.

Today, Joan scheduled a meeting to provide an update on one of the projects, which was the only item on the agenda.

During the meeting, Joan noticed very little participation. The "engagement meter" in the meeting software showed that people were not paying attention for most of the call.



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### Situation #2

To capture their input, Joan invited 8 stakeholders to join the team's discussion about the pricing strategy for a new product.

During the WebEx session, Joan encountered multiple problems, one was people talking over each other. There also were long pauses when participants waited to see if other people were finished speaking. Because Joan wanted to encourage an open discussion, she did not facilitate the discussion and focused mostly on capturing key points.

The meeting had to be adjourned after 1.5 hours. However, the group did not reach a decision about the pricing strategy.



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### Before the V-Meeting

#### General Considerations

- Confirm that a meeting is necessary; avoid information pass meetings.
  - 59% of leaders report spending more time preparing for a status meeting than on the meeting itself.
  - 60% of respondents indicate that they multitask during status update meetings.
- Rotate meeting times to accommodate time zone differences.
- Plan more frequent but shorter, 30-60 minute meetings.



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## Before the V-Meeting

### Participants

- Ensure everyone is responsible for an agenda item.
- Rotate the planning and facilitator role.
- Manage participant numbers.
- Post participants' photos on whiteboard.




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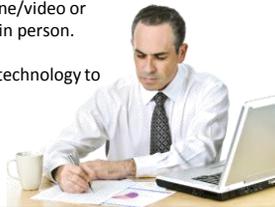
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## Before the V-Meeting

### Logistics

- Send all materials ahead of time or post them on a shared site to give participants a chance to review and prepare questions.
- Establish an "level playing field" – avoid having some people attend using phone/video or computer while others attend in person.
- The medium matters – match technology to the task.




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## Match Technology to Task

Objective/Task	Recommended Technology
Share information or ideas	Email or telephone; Team Sites; Lync as appropriate
Provide updates	Email or telephone; Team Sites
Generate ideas	Teleconferences or videoconferencing; collaborative software such as WebEx (to allow for "brainstorming") Email or telephone (when the focus is on the exchange of individual suggestions)
Solve problems	Teleconferences or videoconferencing; collaborative software (e.g., WebEx)
Make complex decisions	Teleconferences or videoconferencing; collaborative software (e.g., WebEx)
Building relationships, negotiating, or gaining commitment; resolving conflicts	Face-to-face (if possible), videoconferencing

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### During the V-Meeting

To increase engagement during the v-meeting:

- Make time for relationship building
- Ensure interaction
- Provide tools



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### Build Relationships

- Build time into the agenda for “water cooler” conversation.
- As people sign on, greet people and make small talk.
- Take a personal interest in team members just as if you saw them in the office.
- Use empathizing to check in and clarify feelings and emotional reactions.
- Establish processes to build trust and relationships (e.g., group activity, breakout groups).



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### Ensure Interaction

- Only schedule v-meetings for problem solving and decision making.
- Keep the duration of meetings short.
- Ensure everyone knows why they are on the call and what their role is.
- Set expectation for participation in advance.
- Call on people who are not participating (give them notice by saying their name first and then repeat the question).



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## Ensure Interaction

- Vary the way that you solicit input– use polls or “yes/no” buttons.
- Use brainstorming and breakout groups to encourage participation – record comment on a “whiteboard”.
- For small groups, encourage people to stay off mute.
- Provide “color commentary” and describe to remote listeners what is happening.



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## Provide Tools

- Ask people to use the “hand” icon when they have a comment or question.
- Provide video capability on the desktop (Lync, WebEx).
- Use collaborative software (WebEx, Lync) so everyone is looking at the same material and can follow along.
- Use the whiteboard to take notes, record ideas, put things in a “parking lot” for later discussion.
- Share minutes on the screen.
- Use chat/IM functionality to help people connect.



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## Conclude the V-Meeting

- Clearly communicate expectations, responsibilities, and timelines.
- End calls and meetings with clear, explicit instructions so team members understand who is responsible for what and the specific tasks on their to-do lists.



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### Cross Cultural Tips

- Distribute a “world” calendar that shows all national holidays and vacation periods for the countries that are represented on the team.
- Allow more time to make a point or cover an agenda item.
- Provide transitions from one topic to the next and summarize key points and next steps at the end of the meeting.
- Some cultures tend to break in frequently to ask questions, challenge ideas or disagree while others prefer to maintain group harmony by never disagreeing. Probe gently if you think others are holding back their opinions. Consider the reaction of others before you interrupt.

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### Cross Cultural Tips

- Some cultures are more or less formal. Ask how team members would like to be addressed (e.g., are first names acceptable). If unsure, be more formal.
- Different cultures place different importance on punctuality and timing. Understand the differences and discuss and agree on standards and procedures the team will follow. Be prepared to be flexible if differences are significant.
- Some cultures place great value on the speed of decision making while others place greater importance on the need to be inclusive. Agree on a decision making process that balances cultural sensitivity and efficiency.

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### RAMP Model

- Relationships
- Accountability
- Motivation
- Purpose and Process

**Building Trust in a Virtual Setting**

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### No Trust, No Team



NOW WE ALL NEED TO BECOME A LITTLE MORE OPEN WITH EACH OTHER



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### Quick Fact

High levels of trust boost work engagement, leading to increased performance, greater levels of personal initiative, and proactive behavior.

~ Schaufeli and Salanova, 2007

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### The Current State

- Among 600 respondents, 81% reported the greatest personal challenge is difficulty establishing rapport and trust.
- 46% never met other virtual team members face to face, and 30% met only once a year.
- Virtual teams are more challenging than face to face teams when it comes to managing conflict (73%), making decisions (69%), and expressing opinions (64%).

Source: "The Challenges of Working in Virtual Teams" RW3 Culture Wizards 2010



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### The Role of Trust

- Top-performing virtual teams had **significantly higher levels of task-based trust** (a belief that team members will do their job) than did low-performing teams.
- **Interpersonal-based** trust is more difficult, but **not impossible**, to achieve.

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### The Trust Quotient

$$T = \frac{C + R + I}{S}$$

- T trustworthiness
- C credibility
- R reliability
- I intimacy
- S self-orientation



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### Four Factors of Trustworthiness

#### Words

#### Credibility

Truthfulness  
 Credentials  
*I can trust what she says about...*

#### Actions

#### Reliability

Dependability  
 Predictability  
*I can trust him to...*

#### Security

#### Intimacy

Discretion  
 Empathy  
*I can trust her with...*

#### Focus

#### Orientation

Motives  
 Attention  
*I can trust that he cares about...*



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### Tips for Building Trust

- **Credibility:** speak more truth
  - Avoid exaggeration, answer direct questions with direct answers.
  - Admit when you don't know.
  - Show expertise by offering to help find a solution.
  - Partner team members at different locations and rotate these partnerships.

$$T = \frac{C + R + I}{S}$$



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### Tips for Building Trust

- **Reliability:** commit to more actions; do them
  - Make many small promises.
  - Make your work process consistent.
  - Use others' terminology.
  - Use RACI or other role clarity tools.
  - Use action plans to set expectations.
  - Make your work visible.

$$T = \frac{C + R + I}{S}$$



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### Tips for Building Trust

- **Intimacy:** take more risks
  - Set up a team page.
  - State your feelings.
  - Demonstrate empathy.
  - Call to have non-work conversations.
  - Be accessible.
  - Make face time happen or schedule virtual coffee chats or lunches.

$$T = \frac{C + R + I}{S}$$



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### Tips for Building Trust

- **Self-orientation:** think of others more
  - Avoid interrupting people.
  - Identify shared goals.
  - Look for common ground.
  - Find out what's important to others.
  - Get input and buy-in to agendas.
  - INAY: It's Not Always About You.

$$T = \frac{C + R + I}{S}$$



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### RAMP Model

- Relationships
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Managing Accountability Remotely

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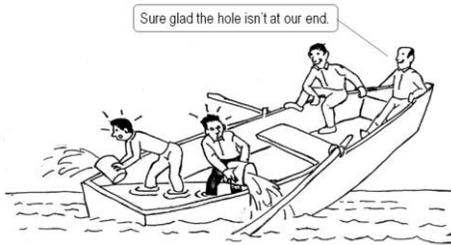
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### Managing Accountability Remotely



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### Accountability Defined

- We take initiative.
- We accept responsibility for our actions.
- We accept responsibility for how our actions impact others.
- We admit when we make mistakes.
- No excuses. No blaming.




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### Accountability in a Virtual Setting

- Autonomy is essential – meeting deadlines and quality is more important than when people work.
- Different metrics might be necessary to measure performance.
- More challenging to monitor and discuss progress.
- Team members' contributions are less visible and "social loafing" may occur.
- Lack of physical proximity may make it difficult for people to prioritize projects as things shift.



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### David Missing Deadlines

Through your efforts to understand the reasons for the team's performance plateau, it has come to your attention that David has been consistently missing deadlines. He recently missed two important deadlines which caused a delay in a product release.

David's performance is negatively impacting the team and you need to take action. However, because David does not report directly to you, managing this may be difficult. David's Manager is your colleague, Pamela Jones.



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### Four Accountability Busters

1. Talking about an idea, but not agreeing to actions and accountability by people's names, and people thus assuming someone else is going to do the work.
2. Agreeing on an action, but without any discussion of a completion date, so the end date is open to interpretation and differing opinions.
3. Waiting until the completion date to check on the results, or not even checking in at all.
4. Not holding people accountable for missed commitments after the fact.

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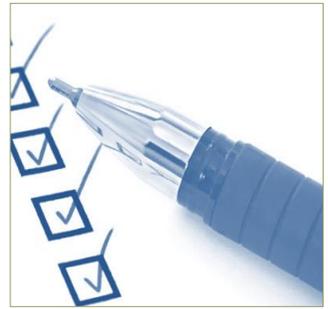
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### Accountability Booster

Set People Up for Success

- A**ction
- T**imetable
- C**heckpoints




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### Virtual Guidelines for Using ATC

- **Action**
  - Use action plans and team project management sites to clarify expectations and who is accountable.
  - Create a system to store team documents and communications.
- **Timetable**
  - Set specific deadlines; post action plan on shared site.
  - Use automatic reminders to notify team members.
- **Checkpoints**
  - Agree to check in at key milestones; integrates project management with coaching.
  - Provides an opportunity to build trust and relationships.

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### Three Coaching Questions

#### After-the-Fact Accountability Booster

- **Past:** “What could you have done to prevent the problem? What, if anything, did you do that might have possibly contributed to the problem?”
- **Present:** “What can you do NOW to get on track?”
- **Future:** “What can you do to prevent this problem from happening again in the future?”

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### Accountability Tips

- Frequently reinforce and update team goals and individual responsibilities.
- Leverage technology to track progress on assignments (e.g., shared sites and project management sites).
- Use meaningful metrics that connect individual contributions to team goals.
- Ensure transparency in individual tasks and goals and project status.

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### Accountability Tips

- Periodically collect feedback from stakeholders to assess the team’s level of performance.
- Encourage a problem-solving attitude instead of making excuses or blaming others.
- Use checkpoints as “coachable moments” for “course correction” and as an opportunity to build trust.
- Reinforce positive behavior and address below standard performance in a timely manner.

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### RAMP Model

- Relationships
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Coaching from a Distance

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### Chat with Us

How is coaching different in a virtual setting?



*Please use your chat window to respond.*

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### Virtual Coaching Is Different

- Need to address issues relevant for virtual workers such as isolation or work/life balance due to time zone challenges.
- Fewer opportunities to “observe” performance.
- Even more feedback is needed, yet fewer opportunities to deliver it in a timely manner.
- Some communication channels might distort the tone or understanding of your message.
- Due to the lack of visual cues, active listening skills become even more essential.

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## High-Impact Communication Skills

### Skills for Listening

- Paraphrasing
- Empathizing



### Skills for Responding

- Balanced Response

“They may forget what you said, but they will never forget how you made them feel.”  
~ Carl Buechner



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## Paraphrasing

- How to: Summarize the **content** of what the other person has said, in your own words.
- Purpose: Shows that you understand (but not necessarily agree with) what the other person said.
- If you disagree, restate the other person’s point of view before stating your own.



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## Example

- Statement

*“I’m not sure about how to handle the situation with the client and because I’m new to the account I think it would be better if you spoke with her.”*

- Paraphrase

*“You’re concerned that because you’re not familiar with the history of this account you won’t handle it properly?”*



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## Empathizing

- Summarize your understanding of how the person is feeling and why – the emotional component of the message.
- Be patient and non-judgmental.
- Do not interrupt. Let people vent if they are upset.
- Overcome the urge to ignore, disagree with, or reject what people say.



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## Example

- Statement  
*“Solve one problem and up pops another. What’s the use?”*
- Empathetic Response  
*“It can be pretty frustrating, and even discouraging, to encounter problem after problem.”*



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## Balanced Response

- A technique for providing constructive feedback about an idea or proposal a virtual team member or colleagues has suggested without being confrontational or diminishing self-esteem.
- Benefits of a balanced response:
  - Allows strengths to be leveraged regardless of weaknesses.
  - Allows weaknesses to be overcome without losing sight of strengths.
  - Highlights points of agreement.
  - Ensures consideration of new and unusual ideas.
  - Positions concerns for problem solving.



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### Using a Balanced Response

- First, state what you like about the person’s idea or suggestion—focus on the positives.
- Second, state what you see as the key concerns or what keeps the person’s idea or suggestion from being totally acceptable.
- State these concerns in an actionable, “How to...” form.
- Use “and” when transitioning from your positive comments to your concerns rather than “but”.

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### Balanced Response Example

This exchange between a manager and her colleague is an example of a balanced response:

*Colleague:*

“Rolling out this new reporting format now would be a big mistake. We need another two weeks of development before we can say it’s more efficient and informative.”

*Manager:*

“You’re right about the additional time. It would mean that we have a format that’s reliable. How can we do this without appearing unresponsive?”

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### Remote Coaching Tips

- Pay attention to tone of voice and inflection.
- Don’t assume – provide context and more detail.
- Ask specific questions to make up for the lack of visual cues.
- Encourage the other person to respond – ask for a verbal response.
- Ask the person to restate what they heard.
- Increase your use of paraphrasing and empathizing to confirm understanding and build relationships.

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### Great Virtual Leaders

- Effectively use technology to bridge the 'virtual gap'.
- Foster an atmosphere of collaboration among team members (i.e., build trust, resolve team conflict).
- Ensure that everyone is engaged and participates in team discussions.
- Communicate team goals/direction and create a sense of purpose.



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### Great Virtual Leaders

- Put processes in place to facilitate information sharing and decision making.
- Hold virtual team members accountable for results.
- Ask for ongoing feedback.



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