

## Consolidated reply on query: IT tools for virtual teams?

On November 26<sup>th</sup>, I (Adrian Gnägi) posted the following query on the km4dev dgroup:

*About 12 months ago, SDC reorganized its support to operations from thematic units in head-office to global thematic networks. Within those networks, virtual teams start emerging (doing experience capitalizations, distilling good practices, drafting guidance documents etc.). Those teams increasingly ask for IT tools to support work processes like:*

- *planning in virtual teams*
- *task implementation monitoring in virtual teams*
- *joint editing in virtual teams*
- *group updates in virtual teams*

*We have no experience with such tools (besides wikis and dgroups). What worked well for you in similar situations?*

In the 2 weeks following the query I received roughly 20 replies, some of them back-channel. This is the consolidation of those replies for the community knowledge repository. I would like to warmly thank all colleagues who responded to my query!

Replies received can be grouped into 3 groups:

1. Process recommendations for finding out which IT tools to apply
2. Tool recommendations
3. Feasibility reflections

### 1. Process recommendations: how to choose IT tools for virtual teams

- see "6 step procedure" in annex 1
- Start by asking people what tools they are familiar with or already use; experience with different tools from one or more team members may provide a capacity building opportunity to share that expertise ("go where people are now, use the expertise in the group and limit introducing too many new things at once").
- Virtual teams have 4 core challenges for which they may need IT support:
  1. Coordinate work on shared projects (project tracking and management with attention to interrelated tasks and tracking milestones, evaluation, etc.)
  2. Share information (ongoing, sharing of links, materials, contacts, etc.)
  3. Think together - help w/ questions, problems, opportunities, ideas etc - using their group mind!
  4. Stay "whole" as a team - relationship, trust, the big and small communications that go into weaving the group into a whole, with both attention to the leader's role, and everyone's role!
- Have the teams analyze at which of the 4 core challenges they are good at, and where they are weak => target new specific tools to the weaknesses (standard tools like email, phone etc. works for the strengths).
- The more diversity in the group the simpler the tools have to be.
- If you want to engage everyone, you need to accommodate the people with the most restricted access, limited bandwidth & least familiarity. Will (motivation) & skill (capability - including physical bandwidth) both have to be taken into account.
- Be alert to time zone issue => this will influence the choice of tools (synchronous or asynchronous work).
- Trying to sell people the full package, when they currently just need one element, risks overwhelming them.

The Knowledge and Learning Process team in Bern is in a unique position to listen and weave together diverse conversations about the value, use, limits and consequences of different tools. Its almost like you might see the KLP team's roles as facilitators of an emerging SDC community of what Nancy et.al so nicely call technology stewards (composed of some of those who are asking for advice on IT tools and others you can attract). That way you won't get in the difficult position of being expected by headquarters to champion and restrict particular tools when the global SDC system you are responding to is inherently complex.

## 2. Tool recommendations

### ➤ **Email, MS Office and phone**

Everybody knows how to use them. If it does the job then it's the right tech! Working with word: Have folders for different versions of files and have a systematic file naming convention.

### ➤ **Google Apps**

Google docs for planning and joint editing => see <http://ictkm.cgiar.org/2009/07/03/useful-tips-for-collaborative-writing-with-google-docs-and-google-sites/> for tips on joint editing; the different Google tools are not well integrated with each other.

A combination Google docs/skype conference call can be used for planning, minute-taking and follow-up of virtual team meetings, see detailed description under T4-2 at <http://apintalisayon.wordpress.com/>

### ➤ **Google wave**

Great mpromises, but still in beta. Currently slow and buggy, no gateway to email (thanks to an unknown mentor who provided me with a free invitation to test; <http://wave.google.com>)

### ➤ **Teleconference tools**

Skype ([www.skype.com](http://www.skype.com)), VOIP buster (<http://www.voipbuster.com/>) and Google Talk (<http://www.google.com/talk/>)

These tools allow you to enter a group conversation. If you use a webcam you can see each other. Skype also has a chat feature, which can be used to track the conversation. As in a regular meeting, how the process is facilitated is most important. Skype chat is good for quick updates and also works asynchronous.

### ➤ **Chat tools**

Yahoo messenger (<http://messenger.yahoo.com/>), MSN (<http://www.msn.com/>), Gabbly (<http://home.gabbly.com/>), Meebo (<http://www.meebo.com/>)

With these tools you can exchange messages via text, one on one or in a group. You can see who is online and then send a quick message. It is easy for short lines of communication: even a little tune, hear what someone is doing. Use of these tools during the work gives a sense of togetherness and cooperation.

### ➤ **Wiki tools**

PBwiki ([www.pbwiki.com](http://www.pbwiki.com)), mediawiki ([www.mediawiki.org](http://www.mediawiki.org)), Wikispaces ([www.wikispaces.com](http://www.wikispaces.com)) and Wetpaint ([www.wetpaint.com](http://www.wetpaint.com))

A wiki is ideal if you want to work together on a document or keep track of an issue where you work with each other. When using a wiki it is nice if someone from the

team feels responsible for the structure of the wiki. Wiki-based tools work great for people who like non-linear thinking and who are a bit more used to working with web-based tools.

➤ **Discussion forums**

Google Groups (<http://groups.google.com/>), Yahoo groups (<http://groups.yahoo.com/>), dgroups ([www.dgroups.com](http://www.dgroups.com)) as email based groups or ning ([www.ning.com](http://www.ning.com)) as an example of an online forum that is not based on email. A discussion forum can be used for asynchronous discussions. So you can post messages on an online forum and later read what your team-mates say. With email group everyone gets all posts by email. The advantage over "normal" email traffic is that there is an online archive (searchable).

➤ **Project management tools**

Base Camp (<http://www.basecamp.com/>) or Foldera (<http://www.foldera.com/>)  
Project management tools are designed to support virtual team work on a project. There are features like a calendar, a to-do list, a message board, milestone tracking etc. There is also the possibility to share documents. It may be useful as a central online place for the team and can act as a 'virtual office'.

➤ **Social book marking**

Delicious (<http://del.icio.us>) , Magnolia (<http://ma.gnolia.com/>) or Furl (<http://www.furl.net/>)

These tools allow you to use the Internet as a place to store and share your bookmarks. It works like the list of "favorites" on your own computer. Social book makes your favorites also visible to others. You can categorize bookmarks by 'tags' related to the topics your team is working on.

➤ **RSS feed readers**

bloglines ([www.bloglines.com](http://www.bloglines.com)) , personalized google pages (<http://www.google.com/ig>) Pageflakes (<http://www.pageflakes.com/>)  
Via a RSS feed reader, you can keep track of new messages to sites with an RSS feed. Usually you get to see the title, and you can click for more information. If the team uses a blog for example, the RSS feed reader makes sure you do not miss a blog post.

➤ **Free Online Surveys online questionnaires**

[www.freeonlinesurveys.com](http://www.freeonlinesurveys.com) , Survey Monkey ([www.surveymonkey.com](http://www.surveymonkey.com))  
Want to know how various team members think on a particular aspect of the project? You can easily compile an online questionnaire and send it to the team. The results are often well organized and graphically displayed.

➤ **Meeting Planner**

([www.meetingwizard.com](http://www.meetingwizard.com)) , event planner ([www.datumprikket.nl](http://www.datumprikket.nl)) and Doodle (<http://www.doodle.ch/>)

With all the different calendars making appointments is often a huge task. There are web tools that make the process a lot easier. Someone chooses a number of suitable dates, other team members indicate which dates suit them.

➤ **Screen sharing tools**

Unyte ([www.unyte.net](http://www.unyte.net)) or Vyew (<http://www.vyew.com/>)  
A screen sharing tool lets you share your computer with someone else at the other end of the world. This would allow you to show your team how to use certain tools, or how the presentation for tomorrow looks like. Useful with a tool like skype

teleconference

- Huddle
- [Dropbox for file sharing, see www.drop.io](http://www.drop.io)
- WebIDEAPro (KS software developed by Applied Intelligence Atelier, [www.a-i-a.com](http://www.a-i-a.com))
- central desktop
- zoho (interesting alternative to Google Apps)

### 3. Feasibility reflections

Frequent problems with tools include:

- a) Time constraints (no time to learn to use new tools => exclusion from group)
- b) Login (password forgotten or login does not work => exclusion from group)
- c) Company firewall (connection with web based tools not possible => exclusion from group)
- d) Low bandwidth (transfer of data is slow => costly, time consuming, participation in certain venues like video conferences not possible)
- e) Unfamiliarity (when operated, tools do not perform as expected by user => frustration, time loss, data loss)
- f) Multiple versions (especially with wiki-type tools, where overview is not quite obvious => several people start working on the same issue without realizing there is duplication)

However, from what I remember of conversations with SDC people last year, one of the key issues is how to work within and through the firewall, Damir's Edge. If that is the case then, much as I agree with Nancy's gradualist, emergent approach to building on where people are and encouraging innovators and champions to take things forward, in bounded corporate structures like SDC with (probably) fiercely security conscious IT Depts, solutions that include a set of functions under one roof that can be locally installed are often easier to take forward - and there are lots of alternatives to Sharepoint!

### Further info

- The book "Digital Habitats: stewarding technology for communities" by Wenger, White and Smith <http://technologyforcommunities.com/excerpts>
- A "full package" of tools for the WASH sector by IRC (presented in the discussion by Jaap Pels), including master account, wiki, social network, search & navigation, mail list, forums, blog, twitter and ways to interlink the different tools; see: <http://mywash.ning.com/>
- Joitske Hulsebosch and Sibrenne Wagenaar have written a most interesting article on virtual teams and tools for virtual teams. In Dutch. The "google translate" English version (easily readable) is in the km4dev dgroups archive (November 26<sup>th</sup> 2009)
- E-learning modules on "Web 2.0 and Social Media for Development (2009)" and "Building Electronic Communities and Networks (2005)", both on <http://www.imarkgroup.org/>
- More comprehensive list of tools: <http://digitalreputationblog.wordpress.com/outils-plateformes-web-2-0/>

## **Annex 1**

### **6 Step Procedure: Tools for Virtual Teams** (by Joitske Hulsebosch and Sibrenne Wagenaar)

1. Start with familiar tools. Exchange of experiences from team members with online tools. Take the time to make up the proposed tools to view or use a "uitprobeerweek. This time investment promotes understanding of each others experiences and preferences online and pay back later.

2. Select tools with the entire team. After jointly explore possible tools to make choices than the entire team. Also make arrangements to use the tools (eg how often you log in?, Which cc you on emails?).

3. Create a culture of experimentation. By an example, you can create a culture within the team is experimenting with tools accepted. This makes the threshold for team members to try something less and make 'mistakes' or 'clumsy' accepted. It prevents withdrawal from the process by fear of unknown technology.

4. Provide a helpdesk. Provide adequate guidance in the use of new tools by frequently to offer support. The helpdesk can own or another team member with specific experience in one tool.

5. Introduce tools step-by-step. Ensure less experienced team members not to experience stress and uncertainty by many new tools. Team members themselves to identify ways of cooperation to search online, you can start offering a new tool. For example, the team wonders how they quickly display short, urgent ask questions, you can propose an instant message / chat tool to use (see box 1).

6. Monitor the individual change. Working with new online tools brings with it a different routine. Team members are not accustomed to such open chat as they work, to direct a question to propose to a colleague. Pay attention to this by now and then the way of working together to discuss. Look for active contact with the project team members to hear the experiences.