



— DRUPALCON —

*Portland*

MAY 20-24 2013

# Remotely Virtual

**Karen Stevenson**



**Building Bridges, Connecting Communities**



# KAREN STEVENSON LULLABOT

# VIRTUAL

- 1) Existing or resulting in essence or effect though not in actual fact, form, or name
- 2) Existing in the mind, especially as a product of the imagination
- 3) Simulated, or carried on by means of a computer or computer network

# REMOTE

- 1) Located far away
- 2) Hidden away; secluded
- 3) Far removed in connection or relevance
- 4) Operating or controlled from a distance
- 5) Located at a distance from another computer

# VIRTUAL OR REMOTE?

- Drupal is a virtual team with remote members
- Lullabot is a real company with remote employees
- Lullabot participates in virtual project teams with clients and other vendors

# WHO IS REMOTE?

- In-house team with remote contractors
- Companies with remote employees
- Companies with remote offices
- Working while traveling
- Working from home during emergencies
- Open source and joint venture projects

# WHAT IS “REMOTE”?

*“Don’t underestimate the significance of small distances ... teams with members in the same building but on different floors performed worse than teams that had members spread across a city, country or even continent.”*

Source: <http://sloanreview.mit.edu/the-magazine/2009-summer/504|2/how-to-manage-virtual-teams/>)

REMOTE IS EVERYWHERE



# BENEFITS

- Access to the best talent, wherever located
- Global perspective
- More productive
- More available
- Less expensive

# BUSINESS INTERRUPTION INSURANCE

*“Today, employers see remote work capabilities as key to keeping their business operating when there are disruptions.”*

Source: <http://mashable.com/2011/10/10/remote-workforce-changing/>

SOME EMPLOYERS DON'T



# EMPLOYEES LOVE

- Flexible schedule
- Work/life balance
- No commuting
- Fewer interruptions

# FIVE COMMANDMENTS FOR TEAM MEMBERS

- I. Thou wilt spend much time on the phone!
- II. Thou must be visible and accessible in virtual channels.
- III. Thou must not disappear without explanation.
- IV. Thou must over-communicate.
- V. Thou must know thy virtual tools.

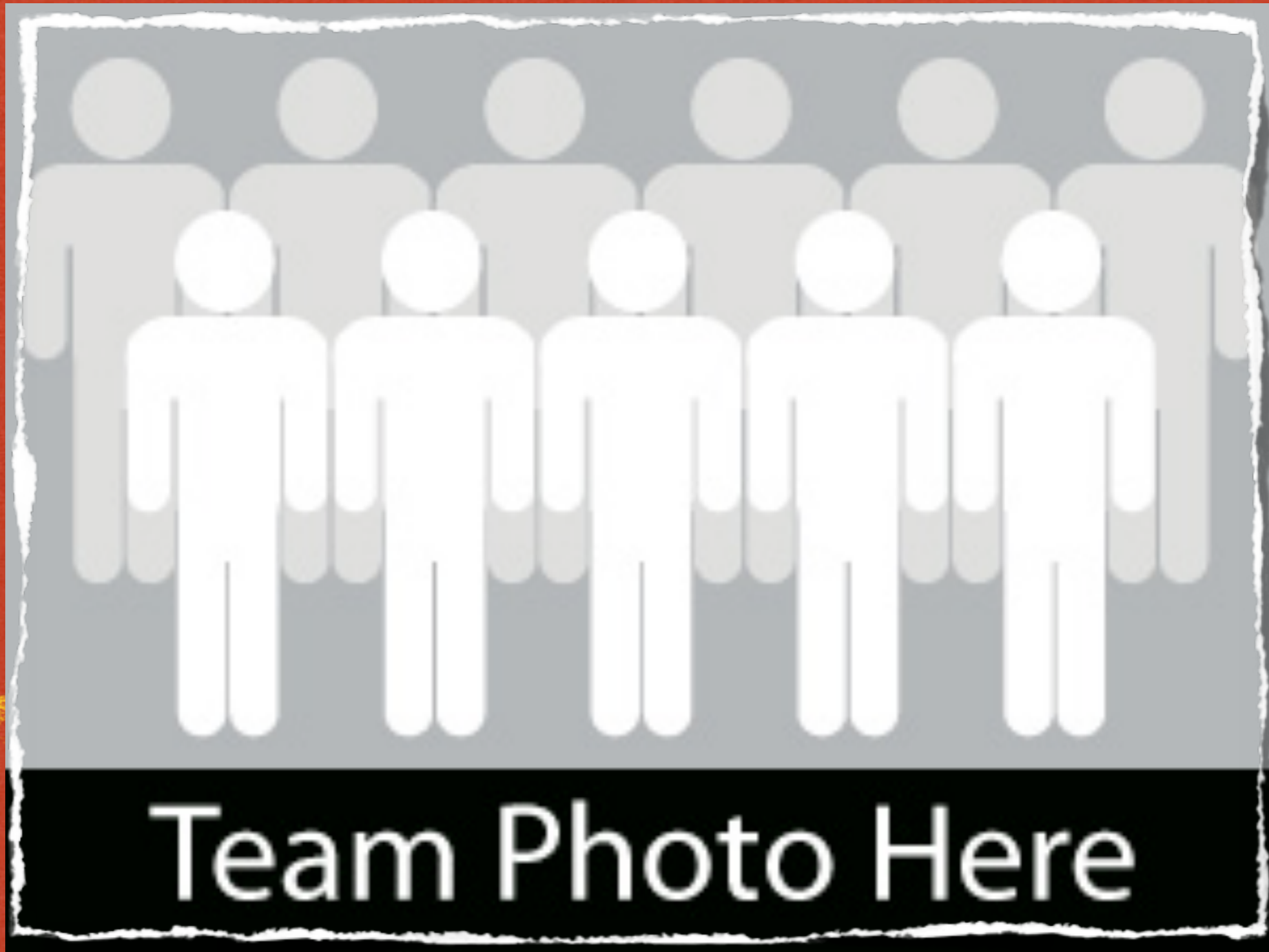
# TIME ON THE PHONE!!



# POTENTIAL PROBLEMS

- Isolation and long hours
- Building rapport with others
- Feeling unvalued or unnoticed
- Separating family and work
- Seeing the big picture
- Loss of casual contacts

# INFRASTRUCTURE





# INFRASTRUCTURE

*“Virtual teams are forced to be better organized and follow clear procedures.”*

Source: <http://rw-3.com/VTSReportv7.pdf>

# INFRASTRUCTURE

- Create a team identity and intranet
- Have an online team directory with photos of each person and contact info
- Treat adding a person to a virtual team like a new employee -- they need the same kind of orientation material and attention.

# INFRASTRUCTURE

*“Each team member should have an understanding of what the others are doing and how each person fits in with the rest of the group”*

Source: [http://www.cscw.msu.edu/papers/INTEnD\\_Summary.pdf](http://www.cscw.msu.edu/papers/INTEnD_Summary.pdf)

# INFRASTRUCTURE

*“Documentation and data sharing is vital for high performance virtual teams ... located in a central location accessible by everyone.”*

Source: <http://rw-3.com/VTSReportv7.pdf>

# INFRASTRUCTURE

*“Virtual teams require a good infrastructure to overcome the lack of personal interaction. We use chats, video-conferencing, and audio-conferencing constantly in addition to one-on-one conversations and email.”*

Source: <http://rw-3.com/VTSReportv7.pdf>

# INFRASTRUCTURE

- Team intranet & directory
- Shared files
- Calendar
- Time tracking
- Multiple communication channels

# INTRANET

The screenshot shows an intranet interface for 'Daily Report' (The Lullabot Office Space). At the top, there are navigation buttons: 'Add Blog', 'Add Other', 'Handbooks', 'Bot Directory', and 'My Account'. The 'Handbooks' and 'Bot Directory' buttons are highlighted with red boxes. A red arrow points from the 'Team Directory' label to the 'Bot Directory' button. Below the navigation is a birthday message: 'HAPPY BIRTHDAY, JOE!' with options to 'View', 'Edit', 'Outline', or 'Rearrange'. It is submitted by 'esther' on 'Wed, 2013-04-03 01:38'. The message content is 'All these things remind me of you! HUGS!' and includes a photo of a purple cake with a white bicycle on top. A red arrow points from the 'Documentation' label to the 'Handbooks' button. Another red arrow points from the 'Bookmarks' label to the 'karen's bookmarks' section. A third red arrow points from the 'Blog about birthdays, benefits, company news, etc.' label to the birthday message. The 'karen's bookmarks' section contains a list of links: 'Access Info', 'Dropbox FTP Server', 'Logging Drupal's Error Messages to Syslog', 'The 877-Lullabot Voicemail How-to', 'Amazon S3 Info', and 'Client Handbooks'. There are also links for 'Create | Manage'.

**Daily Report**  
The Lullabot Office Space


**Team Directory**

Add Blog Add Other Handbooks Bot Directory My Account

**HAPPY BIRTHDAY, JOE!**  
View Edit Outline Rearrange

Submitted by [esther](#) on Wed, 2013-04-03 01:38

All these things remind me of you! HUGS!



**Documentation**

**Bookmarks**

**Blog about birthdays, benefits, company news, etc.**

Handbook!  
Lullabot Employee Handbook

karen's bookmarks

- Access Info
- Dropbox FTP Server
- Logging Drupal's Error Messages to Syslog
- The 877-Lullabot Voicemail How-to
- Amazon S3 Info
- Client Handbooks

Create | Manage

# FILES

 Dropbox

 Sharing

 Links


 Events


 Get Started

 Lullabot

Name ▲

 .AppleDouble


 Books

 botshots



 Clients

 Company Retreat

 Design Assets

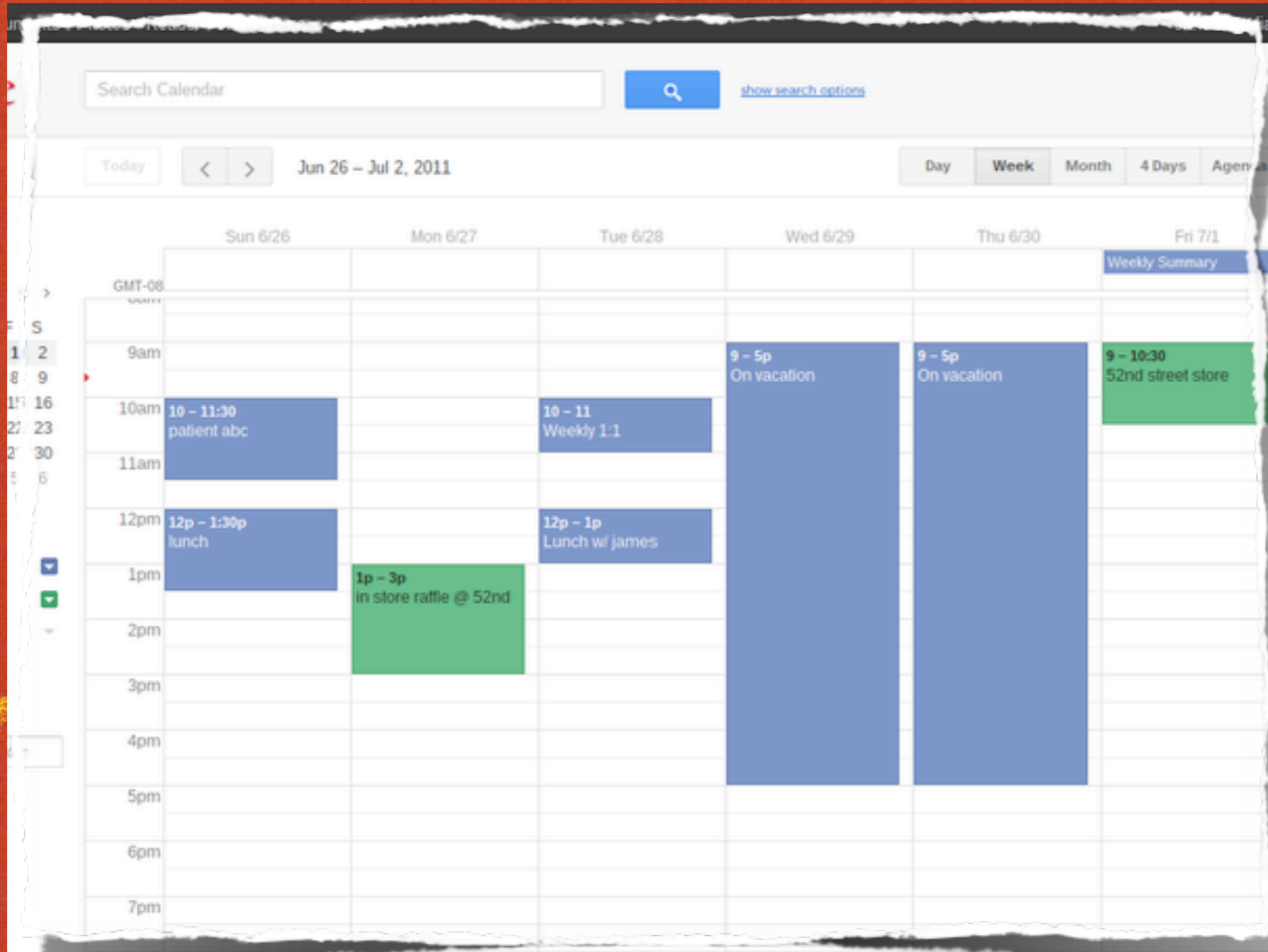
 DIWD



# FILES

- Shared, both public and private
- Hierarchical organization
- Cross-platform accessibility
- Revision history

# CALENDAR



# TIME TRACKING

The image shows a screenshot of the Freckle time tracking application. The interface is clean and modern, with a blue and white color scheme. At the top, there's a navigation bar with the date 'MAR 17', 'TODAY', and a 'CALENDAR' icon. Below this, there are input fields for 'CLIENT OR PROJECT' and 'TAGS OR DESCRIPTION'. A prominent blue bar indicates 'Time tracked for today: 30 minutes', with a pink arrow pointing to a 'LOG IT' button. The main section is titled 'Your Recent Entries' and features a calendar view for the week of March 13th to 19th. Each day has a circular progress indicator and a time value. Below the calendar, there's a list of recent entries with details like client names (Internal, Sprockets Inc, Gear GmbH), tags (marketing, database design, newtag), and descriptions of work done. A sidebar on the right contains navigation links for 'DASH', 'PULS', 'PEOP', 'PROJ', 'INVO', 'TAGS', 'REPO', and 'TIME'. At the bottom, there are keyboard shortcuts: 'start/log', 'SPACE start/pause', and a 'stop' button.

16 MAR 17 TODAY CALENDAR

CLIENT OR PROJECT TAGS OR DESCRIPTION

Time tracked for today: 30 minutes LOG IT

### Your Recent Entries

Mar 13	Mon Mar 14	Tue Mar 15	Wed Mar 16	Thu Mar 17	Fri Mar 18	Sat Mar 19
4½h	4¼h	1¼h	2:50h	30m		
Internal	marketing writing a new blog post	database design	today			
Sprockets Inc	newtag		Mar 15			
Sprockets Inc	did something i've never done before! zomg!		Mar 14			
Gear GmbH	Implementing enterprise remote JSON bean brewing support for Vapor.js with tripple-secure data munging thrown in		Oct 15			

start/log SPACE start/pause stop

# TIME TRACKING

- Timer, constantly tracking OR catch up at the end of each day
- Waiting to the end of the week or month is too late, you won't remember how you actually spent your time
- Not just for billing, it's time management
- Requires discipline, may need gentle reminders

# THE FRECKLE FAIRY



# TIME MANAGEMENT

*“Track your time, and, if your job allows, try to set a limit like 40 hours per week. It's easy to vastly exceed that if you're not paying attention [or]...you may find you're not getting your hours in. Tracking is the only way to tell.”*

Source: Seth Brown

# YAMMER

The screenshot shows a Yammer interface with a search bar at the top containing the text "Search for people, groups and conversations". The main content is a post by Carwin Young, which includes a link to a GitHub blog post titled "Closing Issues via Pull Requests". Below the link is a preview of the GitHub page. The post has received several replies, including one from James Sansbury and another from Juampy NR. At the bottom, there is a reply box and a partial post by Joe Shindelar.

Yammer Search for people, groups and conversations Add Pe

**Carwin Young**  
So here's a solution to linking pull-requests and issues on GitHub that doesn't require `hub`. cc: James Sansbury Seth Brown

<https://github.com/blog/1506-closing-issues-via-pull-request...>

**Closing Issues via Pull Requests · GitHub**  
github.com  
Build software better, together.

Like · Reply · Share · More · May 14 at 1:21pm

James Sansbury likes this.

**James Sansbury:** Nice!  
May 14 at 1:23pm · Like · Reply · Share · More

**Juampy NR:** Thanks for the tip.  
May 15 at 3:03am · Like · Reply · Share · More

Write a reply...

**Joe Shindelar**  
Okay. That's enough for today. Been working on the membership\_entity code. While I think it's still the best way to do this architecturally, it's going to need a LOT of work in order to allow group

# COMMUNICATION

WHAT WE'VE  
GOT HERE IS  
A FAILURE TO  
COMMUNICATE



# COMMUNICATION

*"Managers must develop the communication skills to keep remote workers connected to the team."*

Source: <http://mashable.com/2011/10/10/remote-workforce-changing/>

# COMMUNICATION CHANNELS

- Email & Email Lists
- Mobile Phone
- Conference Call Lines
- IRC
- Yammer
- Skype
- Google Hangouts

# COMMUNICATION

- All teams need good communication, but co-located teams have more chances to stumble across information that wasn't clearly communicated to them than virtual teams do.



# PHONE CALLS



# FIVE COMMANDMENTS FOR PHONE CALLS

- I. Thou shalt use a headset
- II. Thou shalt mute when not talking
- III. Thou shalt Ta Da
- IV. Thou shalt have a conference call system
- V. Thou wilt have international calls

# OVERLOAD



# OVERLOAD

*“Balance availability with respectful disturbances. Being available all the time will wind up in lost productivity and non-stop distractions.”*

Source: [http://www.cscw.msu.edu/papers/INTEnD\\_Summary.pdf](http://www.cscw.msu.edu/papers/INTEnD_Summary.pdf)

# OVERLOAD

*“A simple method to help streamline email usage is to have standards that everyone can agree to. For example, anyone in the "to" line has actions to take as a result of the email; anyone in the "cc" line is just on for FYI purposes.”*

Source: [http://www.cscw.msu.edu/papers/INTEnD\\_Summary.pdf](http://www.cscw.msu.edu/papers/INTEnD_Summary.pdf)



# OVERLOAD

- Schedule time to speak with each other
- Schedule time to go dark: shut off email, instant messaging, and other technology temporarily to get real work done

# BODY LANGUAGE



# BODY LANGUAGE

*“Not seeing body language can also mean that it is difficult to understand exactly what someone is feeling and if this differs from what they are saying so that you can manage their expectations better.”*

Source: <http://rw-3.com/VTSReportv7.pdf>

# BODY LANGUAGE

*“Respondents were concerned about their inability to observe the body language of teammates. They were concerned about whether other team members agreed with or even understood their communications.”*

Source: <http://rw-3.com/VTSReportv7.pdf>

# BODY LANGUAGE

- Managers and team members must explicitly ask questions and offer feedback.
- Use Google Hangouts, Skype, and Facetime when possible to see the people you're talking to.

# BODY LANGUAGE

*“I’ve had to totally change my work process and am much more direct when asking people how they are feeling or acting when I sense hesitation or lack of commitment ... I have to translate what I pick up from body language.”*

Source: <http://rw-3.com/VTSReportv7.pdf>

# GOOGLE HANGOUTS

# GOOGLE HANGOUTS





# ISOLATION



# ISOLATION

*“General feeling of isolation (or being ‘left out’) of certain discussions.”*

Source: <http://rw-3.com/VTSReportv7.pdf>

# ISOLATION

*“Some respondents believed it was easy to become invisible and ‘disappear’ during discussions with virtual team members ... They felt left out, far away, and unwilling to speak up.”*

Source: <http://rw-3.com/VTSReportv7.pdf>

# ISOLATION

- Daily check in, frequent acknowledgement of work being done
- Communicate the big picture, and where team members fit in
- Confirm understanding

# WORK-FAMILY BALANCE

*“Let your family know when they need to leave you alone to work ... if my office door is closed, I'm not here.”*

*Source: Ben Chavet*

# WORK-FAMILY BALANCE

# WORK-FAMILY BALANCE



# TIMEZONES





# TIMEZONE STRATEGY

- 1) Working simultaneously
- 2) 24x7 handoffs

# WORLDTIMEBUDDY.COM

The screenshot displays the WorldTimeBuddy website interface. At the top, the logo "worldtimebuddy" is visible, along with navigation links for "Features", "Widgets", and "Pricing". A "Scheduler" button is highlighted in the top right corner. Below the navigation, a "My Calendar" section is shown, featuring a "1 hour" duration selector and a "Scheduler" dropdown menu with options for "Outlook / iCal", "Google Calendar", "Clipboard", and "Gmail". The main calendar area shows a grid for Friday, May 3rd, with time slots for four locations: New York (11:00a - 12:00p), Chicago (10:00a - 11:00a), Seattle (8:00a - 9:00a), and Madrid (17:00 - 18:00). A red box highlights the "Scheduler" dropdown and the "Outlook / iCal" option. A green box highlights the "11 am" slot for New York, with a red arrow pointing to the text "Time in local format" below it. A "Feedback" button is located on the right side of the page.

worldtimebuddy  
TIME CONVERTER & WORLD CLOCK

Features Widgets Pricing NBA 2013 Playoffs

Scheduler am 24 MX

My Calendar 1 hour

Outlook / iCal Google Calendar Clipboard Gmail

Event LINK TO THIS SELECTION

karen@lullabot.com [ x ]

New York United States, ... 11:00a - 12:00p Fri, May 3 Fri, May 3

Chicago United States, ... 10:00a - 11:00a Fri, May 3 Fri, May 3

Seattle United States, ... 8:00a - 9:00a Fri, May 3 Fri, May 3

Madrid Spain 17:00 - 18:00 Fri, May 3 Fri, May 3

Time in local format

Feedback

# DOODLE.COM

Time zone: (GMT-06:00) CST change

May 2013

S	M	T	W	T	F	S
	29	30	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

Proposed dates:

- 5/13/13 12:15 PM
- 5/14/13 12:15 PM
- 5/16/13 10:00 AM

Your calendars:

- karen@lullabot.com
- Events and Works...
- Lullabot MSNBC
- Out Of the Office

**Proposed Times**

**My calendar**

Scheduler View

Team Member View

Create user-account | Sign in

Join on a time

Enter in the input field below and check the box for times that you are available.

**Team Meeting**

Poll initiated by Karen Stevenson | 0 | 0 | 2 minutes ago

Where: Skype

Time zone: (GMT-08:00) PST change

May 2013	Mon 13	Tue 14	Thu 16
	10:15 AM - 11:15 AM	10:15 AM - 11:15 AM	8:00 AM - 9:00 AM
0 participants	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Can't make it Save

**Participant Sees options in chosen timezone**

# 24X7 HANDOFFS

*“On a recent project, for example, a colleague lived and worked in a timezone that was eight hours ahead of our colocated team ... leaving some of his questions unanswered at the end of our workday ... resulted in nearly a day of lost productivity as his workday started without the answers he needed to move forward.”*

Source: [http://www.cscw.msu.edu/papers/INTEnD\\_Summary.pdf](http://www.cscw.msu.edu/papers/INTEnD_Summary.pdf)

# CULTURE



# CULTURE

- Working through lunch
- When day ends and starts
- Working on weekends
- Holidays
- Communication styles

# CULTURE

*“A US team member said, “OK, we can meet next Thursday. The Dutch members apparently agreed, saying. “Fine. Next Thursday.” However, the US team interpreted the word ‘next’ to mean the upcoming Thursday, while the Dutch interpreted it to mean the Thursday of the week following.”*

Source: [http://www.cscw.msu.edu/papers/INTEnD\\_Summary.pdf](http://www.cscw.msu.edu/papers/INTEnD_Summary.pdf)

# CULTURE

*“An American faculty member said, “We’ll tell the students to [adopt the chosen procedure].” After a brief pause, a Dutch faculty supervisor replied, “We’ll discuss [the chosen procedure] with the students.”*

Source: [http://www.cscw.msu.edu/papers/INTEnD\\_Summary.pdf](http://www.cscw.msu.edu/papers/INTEnD_Summary.pdf)



# LANGUAGE



# LANGUAGE

*“Those who don’t speak English as primary language may get left out, they may have to think about how to respond”*

Source: [http://www.cscw.msu.edu/papers/INTEnD\\_Summary.pdf](http://www.cscw.msu.edu/papers/INTEnD_Summary.pdf)

# LANGUAGE

*“Distribute holiday schedules to each other in advance, and address language difficulties by following up phone conversations with written communications.”*

Source: [http://www.cscw.msu.edu/papers/INTEnD\\_Summary.pdf](http://www.cscw.msu.edu/papers/INTEnD_Summary.pdf)

# LANGUAGE

*“Team members from Russia, China and Spain, were far more proficient in reading and writing English than in hearing and speaking it. As a result, these teams relied much more heavily on text-based tools”*

Source: [http://www.cscw.msu.edu/papers/INTEnD\\_Summary.pdf](http://www.cscw.msu.edu/papers/INTEnD_Summary.pdf)

# LANGUAGE

*“The most highly skilled engineers in the Spanish group were also the least proficient in English. As a result, during their opening video conference, these more skilled engineers remained largely in the background, while a more junior team member took responsibility for communicating with the US students.”*

Source: [http://www.cscw.msu.edu/papers/INTEnD\\_Summary.pdf](http://www.cscw.msu.edu/papers/INTEnD_Summary.pdf)

# LANGUAGE

*“When I asked a question, they didn't just say YES, but they said YES, YOU MEAN THIS AND THIS. They told what they thought I meant. Then I could say you are right. They also send like a brief, a little story how the meeting went, and what the outcome was. So, I could read this and look if I thought it was right.”*

Source: [http://www.cscw.msu.edu/papers/INTEnD\\_Summary.pdf](http://www.cscw.msu.edu/papers/INTEnD_Summary.pdf)

# RAPPORT

# RAPPORT





# RAPPORT

*“We have created a virtual lunch once a month that co-workers can voluntarily attend...This has helped in building rapport with co-workers”*


Source: <http://rw-3.com/VTSReportv7.pdf>

# YAMMER

Search for people, groups and conversations + Add Peo

 **Jerad Bitner**  
"Mom has a Mom and she's my Grandma. Mom has a Dad and he's my Grandpa. Dad has a Mom, Dad has a Dad. There are many many people who love me!"  
If you recognize this, you feel my pain. [#babysigningtime](#)  
[Like](#) · [Reply](#) · [Share](#) · [More](#) · May 15 at 10:53am

[Babysigningtime](#)

 [Matt Kleve](#) likes this.

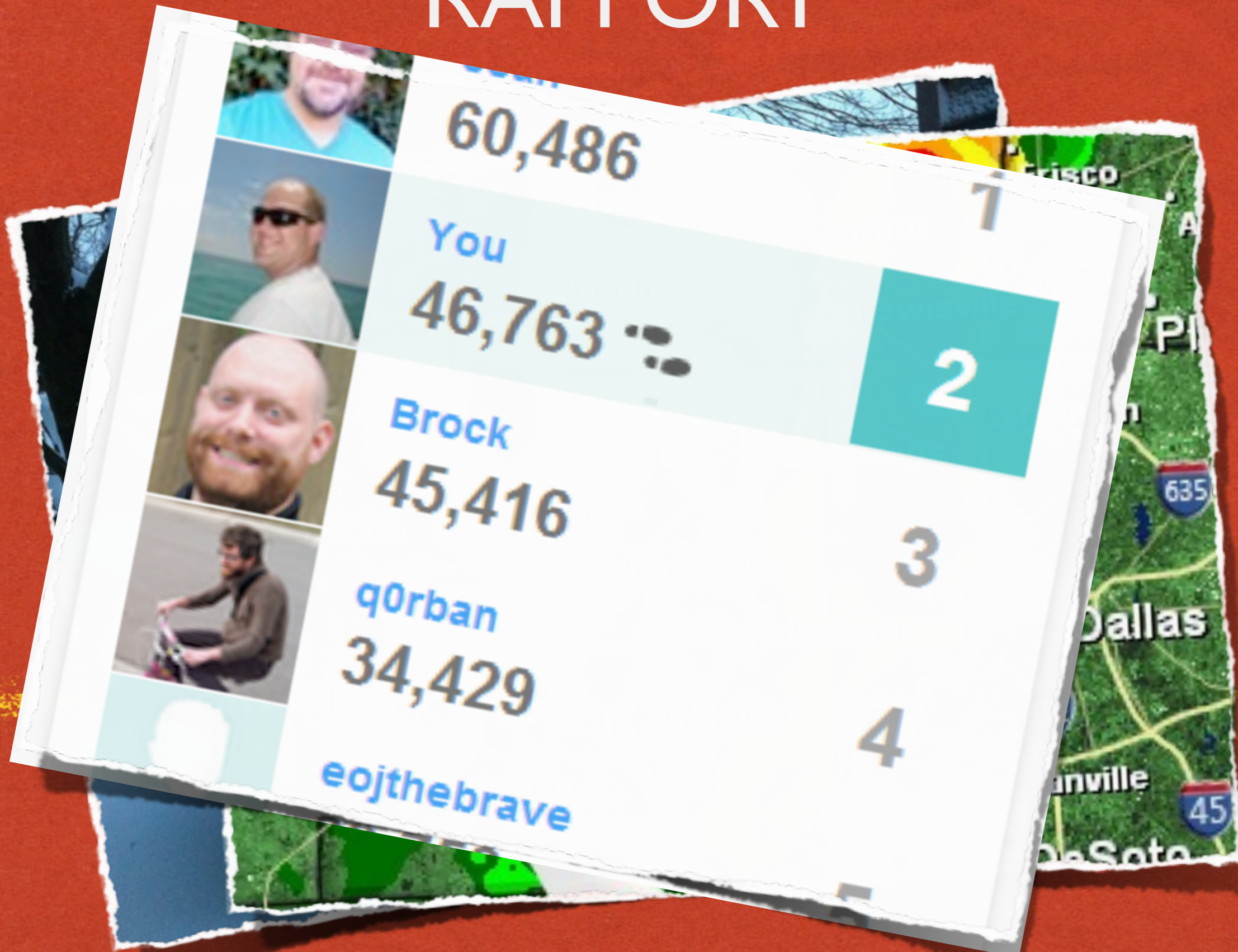
[Show 2 older replies](#) »

 **Andrew Berry:** This is a great excuse to start teaching recursion.  
  
/runs away  
May 15 at 11:40am · [Like](#) · [Reply](#) · [Share](#) · [More](#)  
 [Greg Dunlap](#) likes this.

 **Ben Chavet:** /me smacks [Jerad Bitner](#) for sticking that song in my head.  
  
Gah!  
May 15 at 11:41am · [Like](#) · [Reply](#) · [Share](#) · [More](#)

# RAPPORT

# RAPPORT



# NOT JUST THE FACTS



# NOT JUST THE FACTS



# IN REAL LIFE

- Co-working days, co-working spaces
- Face-to-face retreats
- On-site meetings

# HYBRID TEAMS

- Most local, a few remote
- Especially challenging to manage



# TRUST

*“Following through is especially important with a virtual team because other members may not have any idea that someone is slacking until it’s too late.”*

Source: <http://rw-3.com/VTSReportv7.pdf>

# MANAGEMENT

*“Praise early wins. Managers needed to take time early on to acknowledge small successes and go the extra mile to praise people publicly in a conference call or write a personal e-mail and ‘cc’ their boss,”*

Source: <http://rw-3.com/VTSReportv7.pdf>

# THOU SHALT NOT!

*“The silent approach included screening phone calls from remote colleagues, not returning calls and e-mails, leaving them out of the loop on important decisions or avoiding working with them all together.”*

Source: <http://rw-3.com/VTSReportv7.pdf>

# MANAGEMENT COMMANDMENTS

- I. Thou shalt initiate communication
- II. Thou shalt build team identity and rapport
- III. Thou shalt document everything
- IV. Thou shalt show everyone the big picture

# MEETINGS



# MEETINGS

- Online meetings are easier than ever:
  - Skype
  - Google Hangouts
  - GoToMeeting
  - JoinMe

# MEETINGS

- Can be mixed media (Skype for audio, GoToMeeting or JoinMe for video)
- Make sure ahead of time that everything works!!
- Practice makes perfect -- find a system, get to know it, and keep using it

# MEETINGS

- Introduce everyone if they haven't met.
- Make sure everyone has a list of all the participants (they can't see them to know)
- Identify the participants: Are they employees or contractors? Are they management?
- Send agenda and documents ahead of time



# MEETINGS

- Constantly paraphrase statements to ensure understanding, then ask for consensus
- Keep one person from dominating, draw in those that aren't talking
- Encourage personal conversation before and after, but keep the meeting focused to the agenda

# MEETINGS

- Hybrid meetings (both local and remote)
- Avoid sub-conversations in the corners of the room
- Make sure people on the phone can speak and that they hear everything that is said
- Don't use visuals not everyone can see (1,000 words != a picture)

# MEETINGS

*“I feel that it is hard to get your point across when you cannot see or [use a] whiteboard [to convey] some designs.”*

Source: <http://rw-3.com/VTSReportv7.pdf>

# VIRTUAL WHITEBOARDS

- Skype
- Google Hangout
- GoToMeeting
- JoinMe
- Hackpad
- Google Docs

# MEETINGS

*“Clarify the purpose of EVERY discussion. Often times teams talk in circles because they never clarify the purpose of a conversation upfront. This is even more challenging on remote teams.”*

Source: <http://rw-3.com/VTSReportv7.pdf>

# MEETINGS

*“At the end of meetings/calls, summarize decisions that were made, identify who has key action items, and determine what information needs to be shared with key stakeholders.”*

Source: <http://rw-3.com/VTSReportv7.pdf>

# REMOTE OR NOT?

- Management tools and techniques are just as important to non-remote teams
- The “Grapevine” in a co-located team is a result of a failure to communicate

# REMOTE CAN WORK







QUESTIONS?



— DRUPALCON —

*Portland*

MAY 20-24 2013

**What did you think?**

**Evaluate this session at:  
[portland2013.drupal.org/schedule](http://portland2013.drupal.org/schedule).**

**Thank you!**

DRUPALCON PORTLAND 2013