Challenge Accepted: Managing Polarities to Enhance Virtual Team Effectiveness

By Jean Brittain Leslie, Margaret M. Luciano, John E. Mathieu, and Emily Hoole

Virtual teams (VTs)—groups of geographically, organizationally, and/or time dispersed, mutually dependent employees brought together through technologies to work on the same objectives—are increasingly common in the workplace. Their popularity is attributable to advancements in technology, globalization, and organizations' desires to be flexible, agile, and reduce operating costs. Recent surveys suggest that upwards of 85 percent of global teams collaborate virtually, with over 40 percent never meeting in person. This trend is likely to increase as advances in technology supporting distributed work become readily available in more areas around the world.

Effective VTs can benefit both employers and employees. VTs enable employers to more effectively deploy their human resources, increase agility and flexibility, and may reap benefits in terms of greater employee retention, reduced absenteeism, and lower overhead costs. Employees may benefit from the flexibility of assignments, reduced commuting time and expenses, and the opportunity to work on more challenging and diverse projects. However, not all VTs function effectively. In fact, research shows that they are exceedingly difficult to manage, and some experts suggest that more VTs fail than succeed. The lack of VT success is attributable to challenges associated with working at a distance. Typical solutions offered for these challenges are to try and mimic face-to-face team conditions, which overlook the complexity of virtual teamwork. For example, video and telephone conferencing are often used to create a real-time environment allowing for more

synchronous communication (happening at the same time). Yet, training for VT leaders and members on these types of technologies and other virtual processes is often lacking.

An Underlying Challenge in Virtual Teams

Many challenges VTs confront are not problems to be solved; but rather, polarities to be managed.[1] Polarities are desirable pairings consisting of values, competencies, or strategic outcomes that appear on the surface to be contradictory while in fact are interdependent and complimentary. The apparent conflict between the pairs presents a challenge for VTs. For instance, VTs need to: 1) both plan *and* execute activities; 2) should be both diverse in their thinking *and* unified in their actions; and 3) must focus both on short-term *and* long-term goals. Overemphasizing one value, or pole, generally undermines the other.

Polarities, as defined here, show up in all facets of organizational life but are particularly acute in VTs. Polarities are not problems that can be easily solved with compromises or one-time solutions; rather, they require "both-and" thinking and persist over time. A key to polarity thinking is that any given pole may offer certain benefits, but brings with it other disadvantages if overemphasized. Research has shown that when people become overly committed to achieving one pole of the pair, the harder it is for them to "see" its negatives and the benefits associated with the opposite pole. This can create blind spots for a VT if all members are committed to a given pole or drive rifts between members if some are committed to one pole and others are committed to the opposite pole. Polarity thinking is designed to overcome blind spots or conflicts concerning preferred poles by promoting both-and thinking. This kind of thinking supplements traditional "either-or" problem solving thinking and acting with an effort to maximize the benefits of both poles while minimizing their disadvantages.

We studied 140 VTs from 56 organizations, whose members were located across 40+ countries. As polarities are everywhere, we sampled across industries, types of organizations, and types of teams. We identified four key VT polarities (see Table 1). In short, effective VTs successfully manage *formal* (e.g., emails, meetings) and *informal* communication (e.g., IM, GTalk), *task* and *relationship* leadership behaviors, while working both *apart* and *together* maintaining both *flexible* and *traditional* schedules.

Communication: Formal and Informal

- *The challenge.* Communication is strained in virtual teams. Members struggle to understand the context and nuances surrounding others' inquiries and who should be included in an exchange. Misinterpretations of silence, timeliness of responses, members' differing interests or goals, anxiety or uncertainty, and cultural barriers are common occurrences. Virtual collaboration tools introduce a number of logistical challenges ranging from connectivity issues, to bandwidth, to technical knowledge and support-related issues.
- *The polarity.* An underlying polarity to this challenge is the necessity to attend to both formal (e.g., emails, meetings) and informal communication (e.g., IM, GTalk, texting).
- *The benefits of focusing on each pole.* Formal communication is useful for sharing large amounts of important information and establishing a shared understanding of team responsibilities and goals. Informal communication gets team members real-time answers, deepens relationships, and aligns individual perspectives to team goals.
- *The detriments of over focusing on one pole to the neglect of its pole partner.* Strict use of formal communication can lead to time-consuming meetings and delays while waiting for formal responses. Whereas strict use of informal communication can lead to ambiguity about team goals and responsibilities, confusion about required actions, and leave some members feeling sidelined.

Leadership: Task and Relationship

- *The challenge.* VTs require effective leadership to help establish high-quality working relationships. The formation of effective working relationships often involves numerous formal (e.g., team-building events) and informal (e.g., having lunch or coffee together, chatting by the water cooler) interactions, which are costly if not impossible to duplicate in VTs. Interpersonal challenges arise for a number of reasons, including a lack of accountability, a lack of attendance or engagement in team-building activities, and focusing on non-task issues.
- *The polarity.* An underlying polarity to this challenge is the team being attentive to both task and relationship leadership behaviors.
- *The benefits of focusing on each pole.* Task-oriented leadership behaviors (e.g., establishing shared norms, holding the team accountable for

TABLE 1: EXEMPLAR VIRTUAL TEAM POLARITIES

COMMUNICATION

Left pole	Formal	Informal	Right pole

LEADERSHIP

Left pole	Task	Relationship	Right pole

SCHEDULE

Left pole	Flexible	Traditional	Right pole

SYNCHRONICITY

Left pole	Working Apart	Working Together	Right pole

performance) are critical to assure the work of the team is delivered on time and that there is a sense of progress and pride in the team's work. Relationship-oriented leadership behaviors (e.g., attending to members' well-being, maintaining a sense of inclusion) promotes positive interpersonal interactions and lays the foundation for the effectiveness of other processes.

▪ *The detriments of over focusing on one pole to the neglect of its pole partner.* Overemphasis on the task to the neglect of relationships can result in team members failing to form a cohesive team and reduction in helping behaviors, whereas overemphasis on relationships to the neglect of the task can result in missed deadlines, losing sight of the team's objectives, and lack of accountability.

Schedules: Flexible and Traditional

▪ *The challenge.* Logistics coordination across time and geographical distance are a core challenge faced by VTs. Many global teams work hours that expand to 24 hours a day, 7 days a week. Work locations might include homes, hotels, airplanes, cars, sports fields, dance studios, and customers' offices. Technological overload, coordination across time zones, time constraints, and increased stress can threaten boundaries between work and personal life.

▪ *The polarity.* The underlying polarity of this challenge is the need for a flexible and traditional schedule.

▪ *The benefits of focusing on each pole.* With flexible schedules, VT team members adapt to when and where they need to work so that deadlines are met, including responding to requests outside of traditional business day hours. Traditional schedules respect members' need to maintain a consistent work schedule, clarify when teammates will be available, and help members to schedule their other obligations.

▪ *The detriments of over focusing on one pole to the neglect of its pole partner.* On one hand, strict adherence to a traditional schedule may make team meetings difficult and require members to wait hours for responses slowing problem solving and putting the team behind schedule during high-intensity periods. On the other hand, overemphasizing a flexible schedule at the expense of traditional scheduling may result in coordination breakdowns, expectations of 24/7 availability, blurring of work-family boundaries, and member frustration and fatigue.

Synchronicity: Working Apart and Together

▪ *The challenge.* Coordinating and combining efforts are important aspects of VT work. For many VTs, all members being physically together is likely to be an infrequent or impossible option so determining when and how to work together (physically or virtually) becomes an important question. These issues are exacerbated by members' time zone and technological differences. Knowing when to have team members work on individual tasks, or in smaller groups, versus when to have all members together for synchronous work (physically or virtually) becomes a vital question.

▪ *The polarity.* It is necessary for VTs to work both apart and together—both asynchronously (working at different times) and synchronously—to be effective.

▪ *The benefits of focusing on each pole.* On one hand, working apart is useful as it allows members (or groups of members) to focus on their specific roles and contributions, and schedule their own activities. On the other hand, working together is important for problem solving, developing deeper relationships, concentrated attention on shared team tasks, and keeping everyone working toward the same ends.

▪ *The detriments of over focusing on one pole to the neglect of its pole partner.* If teams overemphasize working apart, solving issues independently can result in conflicting ideas, solutions, and products that lack integrations. Whereas, if teams overemphasize working together in real time they will inevitably suffer delays and frustrations associated with coordinating synchronous activities and are susceptible to groupthink.

Our study results showed that the struggle to manage polarities was worth the effort. VTs who well managed the four polarities had higher levels of performance, commitment, satisfaction, viability, and informal learning. In short, successfully managing polarities is critical for VTs. So the question becomes what can HR do to help them in the effort?

Embracing the Challenge of Managing Polarities

Our research also introduced a training program designed to help VTs to better recognize and manage their polarities. A few weeks before training, we gathered baseline information from both VT members and leaders about their current status on the polarities as well as team and individual characteristics and outcomes. The training featured a virtual training session delivered via WebEx open to all team members and the team leader (average attendance was 60 percent) about the basics of polarity thinking, a guided debrief of the team's results from the baseline survey, and a discussion about how to leverage the polarities more effectively. The goal of the training session was to help team members recognize their polarities, identify areas for improvement, and start to create an action plan to better manage them in the future. About six months after the intervention we again gathered information from both team members and leaders and tested for differences. The success of the training intervention varied widely with some teams improving their outcomes by over 50 percent, whereas on average teams improved their outcomes by a more modest 2 to 5 percent. Based on the study findings and insights from the teams that effectively managed their polarities, we offer the three As of managing polarities: aware, align, and acquire.

Be Aware

Helping VTs optimize their effectiveness requires a deep understanding of their unique challenges and underlying polarities. We recommend HR train VTs on polarity perspective taking and conduct assessments.

Polarity perspective taking. When raising awareness, HR

needs to first address whether the challenge is a problem or a polarity. Outward signs of a polarity are persistent tension, reoccurring chronic issues, mixed contradictory messages, and strong resistance to change. The role of the leader is to explore opportunities and advantages in the tensions rather than suppress or deny them. Once team members recognize that elements of their thoughts, actions, and emotions are complementarily and equally true, they can begin reframing the seemingly contradictory perspectives from an either-or perspective to a both-and perspective (polarity thinking).[1] Transformation begins once VTs (1) realize their present understanding is no longer sufficient, (2) begin experimenting and taking in new information and viewpoints, (3) can see two viable alternatives, and (4) look for new solutions that accommodate conflicting perspectives through both-and thinking. The question then becomes, "how can we do both?" followed by "which actions are most suitable for our team context" and "what do we need to accomplish that." Both-and thinking can initially feel counterintuitive and will take practice and patience.

Assessment. Awareness can also be raised by an assessment of a VTs current status on selected polarities (e.g., through group discussion, survey, and feedback) or more ideally, an assessment combined with polarity thinking training. The assessment should contain items on the potential benefits of each pole and the potential detriments of over-focusing on each pole to the neglect of its pole partner, as it is important that team members see the potential for good and bad from each pole of the polarity. This helps to minimize rifts between members advocating different poles of a polarity (e.g., some members advocating for more traditional schedules and others pushing for more flexible schedules), as members can see the benefits and detriments of both poles. Understanding how polarities work also helps team members to know when adjustments are necessary and to recognize other polarities that they may face. For example, experiencing difficulties when trying to integrate the contributions of different members may signal a challenge stemming from the synchronicity polarity.
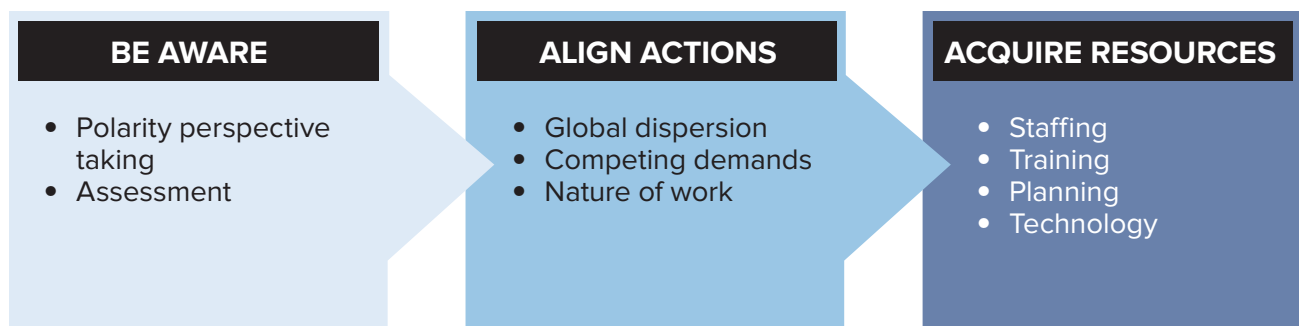
Align Actions

Once VT members are aware of their polarities they can then consider how to manage them. For each polarity there are actions that can help achieve both-and results (see Table 3). However, to fully leverage the power of polarities for improving team effectiveness, *actions* must be *aligned* with the team's characteristics. Not all VTs are the same, and some of their key features cause some actions to be more beneficial than others. HR can help VTs best customize action plans by considering their: 1) global dispersion; 2) competing demands; and 3) nature of work.

Global dispersion: Are team members located around the world? Global dispersion describes the extent to which team members are separated across time and geography. Members of globally dispersed VTs are likely to live in different time zones and struggle to find common meetings times. In these cases, many of the typical recommendations to manage the *scheduling* polarity (e.g., 2 to 4 core hours where all team members are expected to be available) are no longer feasible. When this happens, teams need to shift to more asynchronous means for communication (i.e., document repositories, threaded discussion lists, email). The challenges of global dispersion become even more exacerbated when: 1) frequent communication is required among team members; and 2) when the team has high levels of diversity. Cultural differences, for example, can challenge team members' communications and increase the potential for misunderstandings. Differences often make it harder to find common ground and bond over shared interests, putting pressure on the relationship pole of the *leadership* polarity. In these instances, creating opportunities for shared experiences and assuring ample time for informal communications becomes very important. Ensuring open communications and knowledge sharing among members is vital for all teams and especially for VTs.

Competing demands: How many other commitments do VT members have? Employees are often called upon to simultaneously participate in numerous VTs as well as more traditional work assignments. Many of the common recommendations for managing VTs assume members' efforts are focused on that one particular team. For example, VTs are often encouraged to synchronize their schedules, establish goals, and set deadlines. However, when members are assigned to multiple teams, synchronizing their schedules becomes like trying to solve a constantly reconfiguring Sudoku puzzle. Some control mechanisms (e.g., project management soft-

TABLE 2: THE THREE As OF POLARITY MANAGEMENT

BE AWARE	ALIGN ACTIONS	ACQUIRE RESOURCES
• Polarity perspective taking • Assessment	• Global dispersion • Competing demands • Nature of work	• Staffing • Training • Planning • Technology

ware) that specify members' roles and responsibilities, as well as track progress toward goals per team, can help leaders and members to deconflict the bottlenecks and "pinch points." Yet no technology solutions can fully overcome members' having too many team assignments and other commitments which inevitably create conflicts, overloads, stress, and frustration for all. It is critical for HR to have a strategy for assigning members to VTs and to minimize overcommitting members.

Nature of work: Is the work tightly connected and/or flexible? The final team characteristic, nature of the work, requires HR to inquire about the type of tasks the VT performs. VTs engage in many different types of tasks, and the features of those tasks (e.g., interdependence, timeline flexibility) dictate how challenging they will be for VT members to coordinate. The more the team task requires team members to work at the same time, the more they need to use tools that enable real-time communication. This has direct implications for who should be on the team (e.g., can you minimize time zone differences) and which technologies (e.g., shared virtual workspaces, teleconferencing) are important. Some projects enable individual members or smaller subsets of members to work independently for long stretches with minimal coordination, whereas other tasks demand a tightly orchestrated set of activities among all team members. To the extent that the VT tasks requires simultaneous activities with minimal flexibility, members need to coordinate using more synchronous virtual tools. Alternatively, to the extent that there is minimal need to coordinate activities in real time, members can sequence activities with a great deal of discretion and asynchronous tools may be more suitable for coordinating their activities with an occasional same-time review during critical or milestone points in the project.

Acquire Resources

The power of polarities come when VT leaders and members are aware of them, consider how to align their actions with their context (e.g., nature of their work), and can acquire the necessary resources to manage their polarities. Although there are no universal panaceas for achieving both-and results, there are some key areas where HR can take a leadership role: 1) staffing, 2) training, 3) planning, and 4) technology.

Staffing. The first and most important staffing consideration is who really needs to be on the team and how many other team memberships they are committed to. Generally speaking, teams should be relatively small, ideally around seven members (plus or minus two). Second, consider the value of establishing "core" versus "peripheral" memberships. Core members are actively engaged and peripheral members are simply informed of progress or brought in for specific purposes. Important but overly committed staff may be better suited to be peripheral team members. Finally, weigh the benefits of adding someone with unique knowledge, skills, abilities, or other characteristics versus the coordination challenges associated with that person interacting virtually.

Training. Sensitize VTs to polarity thinking (e.g., provide training on polarity thinking, administer and debrief polarity assessments). Both-and thinking can initially feel counterintuitive and will take practice, patience, and suspending preferences for "quick fixes" as polarities are ongoing challenges. Foster a culture that integrates polarity management as a teamwork leadership competency. Support team leaders and members as they integrate polarity management into their practice by accepting the fact that successful VTs must act paradoxically to be effective. Finally, help teams tie action plans and efforts to leverage polarities to broader organizational outcomes (e.g., strategy, culture).

Planning. Having a clear blueprint for what needs to be accomplished helps VT members to coordinate their efforts, especially when they are separated by time and geography. Proper planning, scoping, timing, resources, feedback mechanisms, etc. help team members understand their roles and maintain awareness of requirements and progress. In addition, it is important to lay a solid foundation concerning how the VT will operate as a team and encourage VT leaders to create team charters or role responsibility grids where members familiarize themselves with one another and establish procedures for coordinating their efforts, providing input, gaining feedback, and making decisions. Next, detail which virtual tools will be used for what purposes. This is vital for streamlining communications, minimizing multi-channel overload (where the same information is sent via multiple mediums), and avoiding work falling in the cracks between members. Other preparations such as team training (especially for unusual or new work activities) and team building (especially for teams with little member familiarity) help members to get off on the right foot.

Technology. Have the right tools for the job and assure team members know how to use them. VTs need to select the appropriate tools, which requires being aware of the digital suite of collaborative tools, considering which technologies can realistically be available to all members (e.g., access to technology, bandwidth, internet connection speeds, etc.), and then training individuals on how to use them, for what purposes, and when. Note, the latest technologies, the most "lifelike," or "what we have always used" are not necessarily the best choices. The tools that are well aligned with the tasks that need to be accomplished, and that members know how to—and will actually use—represent the best tools for the job. In addition, HR can help assure VTs select a sufficient number of tools to enable both formal and informal communication, but not so many that it becomes unclear which ones to use for different activities. For instance, if some members use texts from their mobile phone while others employ IM tools for instant updating, communications will be lost. Finally, VTs need to select collaboration tools that are sensitive to global dispersion/time zone differences and the amount of time spent traveling. For example, phone calls are often a suitable way to quickly obtain clarification or work through a complex issue. However, if the communication needs to occur when the intended recipient is likely unavailable (e.g., sleeping, on an airplane, with a client), email may be the preferable tool.

TABLE 3: POLARITIES AND HOW TO MANAGE THEM

Polarity	Salient VT Characteristic	Sample Aligned Actions That Can Help Achieve Both-and Results
Communication Formal and Informal	Nature of Work	• Determine which communication channels should be used for what purposes (e.g., emails might be used for formal business memos whereas IMs may be informal). • Provide individual and team feedback on appropriate use of communication channels. • Create opportunities for informal communications, such as open-door periods and chat rooms pre- and post-formal video conferences.
Leadership Task and Relationship	Global Dispersion	• Initially encourage background posting/sharing, team chartering exercises, and use richer communication virtual tools (e.g., video conferences) to build rapport. • Consider targeted onboarding or training for individuals or small sets of people to get everyone ready to collaborate. • Leverage formal planning and scheduling tools, knowledge repositories, and informational resources to clarify assignments and minimize frustrations.
Schedule Flexible and Traditional	Global Dispersion	• Develop a formal schedule for team milestones and deliverables between which members are free to schedule their own pace and processes. • Designate some predetermined "core times" when synchronous collective work will be conducted. • Have a place where individuals can get up to speed at their own pace (e.g., threaded discussion lists, email threads, knowledge repositories).
Synchronicity Working Apart and Working Together	Competing Demands	• Determine when and what activities are best accomplished synchronously and would benefit from in-person meetings or higher-richness communication channels. For instance, project launch and scoping, critical milestones or gateway reviews, transitions from one set of activities to another, and emotionally charged issues are often best handled using synchronous higher-richness communication channels. • Minimize the temptation to lean toward synchronous forms of communication when not necessary.

Accepting the Challenge

To reap the benefits of VTs, HR has a significant leadership role training and guiding virtual team leaders and members on how to best manage polarities. VTs need not be thwarted by polarities, but they must accept the challenge of actively managing them. The key is to be aware of the polarities, use that knowledge to make better aligned actions, and acquire the necessary resources. ▪▪

Jean Brittain Leslie is a Senior Fellow and Director of Strategic Initiatives at the Center for Creative Leadership. Leslie has published more than 90 pieces on leadership, assessment, and feedback in the form of peer-reviewed articles, popular-press articles, book chapters, and books. She can be reached at lesliej@ccl.org.

Margaret M. Luciano is an Assistant Professor at the W. P. Carey School of Business at Arizona State University. She has published several articles and book chapters related to teams, multiteam systems, and dynamics over time. She can be reached at Margaret.Luciano@asu.edu.

John E. Mathieu is a Board of Trustees Distinguished Professor at the University of Connecticut, where he also holds the Friar Chair in Leadership and Teams. Mathieu has over 100 publications, 200 presentations at national and international conferences, and been a PI or Co-PI on over $11.1M in grants and contracts. He can be reached at John.Mathieu@UConn.edu.

Emily Hoole is the Group Director of Global Research and Evaluation at the Center for Creative Leadership. Emily has published numerous articles and book chapters related to evaluation and organizational learning. She can be reached at hoolee@ccl.org.

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