Article 4

Only a Click Away? – What Makes Virtual Meetings, Emails and Outsourcing Successful

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4.1 Introduction

Scenario 1: Imagine you receive the following email: 'Hi – How r u? i'm working on a case study. Free 2 discuss this together next Monday? Cheers!' How would you react if this email were from a) an old friend, b) someone from the team you supervise, or c) a non-English speaker who you met briefly once and who might be a potential collaborator?

Scenario 2: Management in your organisation recently decided that in the light of the latest cuts and changes, part of your customer services will be outsourced to a call centre in India. You are in charge of making this work and integrating the remote call centre with the rump customer relations team in the UK. What looks good on paper gives you endless headaches. How do you ensure that service quality remains the same? How do you convey your service philosophy to the Indian team; and how do you make sure that all necessary information on daily business is reliably exchanged?

Today, all of us are virtual workers to some degree and the above are only two examples of the many ways in which we might be confronted with electronic communication at work. Even employees working in the same building exchange most information via email and they do large portions of their work using various IT technologies, such as shared databases, intranet and wikis. Some are remote workers altogether, working in different locations in or outside of the country, working from home or being members of outsourced service teams, and have to rely almost entirely on virtual communication media, also for meetings across locations. A third and increasingly important category are the 'switchers' – that is, people who constantly switch between on-site and off-site work, and virtual and face-to-face collaboration. Even if your organisation is not yet relying much on electronic media, it is likely that the future will bring increased use of such forms of communication. Much of this development is technology driven (for example due to the availability of smartphones, wireless internet access and so on), but the financial crisis further increased the pressure to outsource services, save on travel expenses by using electronic meetings instead.

Electronic media facilitate these different types of cooperation regardless of location, time zones, organisational affiliation and social and cultural background. Everyone is – seemingly – only a click away and huge amounts of data and documents can be exchanged effortlessly. But despite all this virtual flexibility, people are still physical beings, always located in a specific place and time, with a history and rooted in an organisational context with its specific culture and norms that govern their life.

Because of these developments, managers today need to understand the psychology of virtual collaboration, how people cope with the new electronic challenges in the workplace and the loss of direct contact in many of their work relationships, and how virtual collaboration can be effectively managed. This article gives an overview of the latest research results on the psychological aspects of electronic media use – such as email use and collaboration across different locations and countries in dispersed teams – and the most important implications for managers that follow from this research (see tips box at the end).

4.2 Key differences between face-to-face and virtual collaboration

To get a handle on managing virtual collaboration we first need to understand the most important differences between virtual and face-to-face interactions:

- Virtual collaboration generally provides *fewer social cues* than is available if you work in the same location (Sproull & Kiesler, 1986). Virtual environments are relatively lean and lack the ability to carry social, non-verbal and feedback cues which limits their suitability for complex tasks involving ambiguity and uncertainty. They are also relatively lean compared to phone conversations, where you still have tone of voice, which for instance

helps to detect irony, and the possibility to ask for clarification, give instant feedback etc. The difference between virtual and face-to-face communication is relative, as social cues can be made available via electronic media to a certain extent, for example in media like Skype or video conferencing or by expressing emotions through emoticons, albeit not in the same way as in face-to-face interactions. Also, social and non-verbal cues in virtual environments can achieve greater 'richness' with time and experience, and when relations are better formed. However, *special efforts are needed to replace the social cues of face-to-face interactions* electronically, such as communicating more frequently and conveying more social, contextual and relational information, for instance in emails, than one normally would and if working in the same building.

- Remote team members tend to know *less about the context* in which distant colleagues work (Cramton, 2001) as there is no or less opportunity to learn about others through observation of their behaviour and their work environment. The social processes that groups and organisations rely on to *coordinate their activities* and develop their relationships, for instance setting goals, defining rules, working out schedules and coordinating tasks, thus become *harder to perceive, infer and apply* in virtual environments (as in the outsourcing example in Scenario 2 at the beginning).

- *The increased anonymity in electronic communication* can result in less awareness of the impact of one's own behaviour as well as the reactions of others. This can have a disinhibiting effect and lead to reduced politeness (like in the email example in scenario 1 in the introduction) and even increased aggression (Postmes *et al*, 2000). In a leaner virtual environment with little information about individuals and their work context, *groups and their rules become more prominent* than in a traditional work setting. If rules are violated, for instance email etiquette, timelines not met, or someone is upset about not being copied into an email, this can have a very negative impact on the work climate and lead to negative personal attributions, such as incompetence, laziness and so on. This is much more likely to happen in a virtual work context than if people work together in the same place and are aware of all those small daily occurrences in offices and contextual circumstances. For instance, if they witness that a colleague has been called into an unscheduled meeting by the boss and piled with additional work they are likely to cut that colleague some slack for the delay in delivering the agreed results (and are probably happy they weren't called in themselves). But if they work in a different location and cannot know about those things, they tend to be much more rigid in sticking to rules and agreements. Not because they are intentionally unfair or obstinate, but simply because this is all they know and can go by.

- *Social norms* – that is, the rules and values that we share and agree on and which shape our behaviour and our expectations – are always central to regulating all forms of human interaction, whether virtual or not. However, if people are working in different locations this usually leads to the development of *different rules, norms and subcultures* (Moser & Axtell, 2013). If they still need to cooperate, these differences in norms and expectations across locations can result in *increased conflict and reduced motivation* and can in turn hamper cooperation and performance within virtual work environments. Rules, values and expectations about appropriate behaviour thus matter in two important ways in virtual work: firstly, people tend to be more aware of them because they know less about individuals and their circumstances as described above and secondly, because the rules and values and expectations tend to be different in different locations.

1. Setting rules for virtual communication from the start

Recent research indicates that by setting explicit rules at the very start (for example: communicate frequently, always acknowledge messages), uncertainty and ambiguity in virtual collaboration can be reduced and in turn have a positive effect on social processes in virtual groups such as increased trust by providing shared expectations and shared goals (Walther & Bunz, 2005). This may seem simple, but is actually a crucial point and important difference to co-located work settings where we constantly seek those reassurances without even noticing and often in an informal way. Managing virtual communication effectively thus means that this lack of opportunity for informal contact needs to be compensated for by communicating much more explicitly and much more frequently.

This has also to do with the fact that the function of emails in a traditional work setting is entirely different from its function in a virtual environment: in a face-to-face context, emails are compensatory to all other forms of communication and can contain much less context information and detail than in a virtual work context, where electronic communication has to take over all of the functions that otherwise meetings and informal contacts have.

2. Making implicit rules explicit through regular feedback and discussion

All organisations and groups have implicit rules and norms as part of their culture – that is, things everybody tacitly agrees on without ever consciously thinking about them or discussing them. These can be things like dress codes, formality or informality of address, use of humour or whether it is seen as appropriate or not to talk about private matters at work. If someone is new in an organisation, the newcomer learns about those tacit rules by observing others and their behaviour in the workplace. In virtual collaboration there is no opportunity of direct observation and so all those tacit rules and norms need to be explicitly stated, talked about, and their appropriateness discussed and possibly changed for a good virtual working relationship.

A study in online Usenet groups (Burnett & Bonnici, 2003) found that implicit norms (use of self-deprecating humour; language and style used in posts) often became explicit over time, because norm violations would instigate discussions about acceptable behaviour, and that once the group members were in agreement, these norms tended to be turned into explicit norms and rules of conduct. In the work context, the same applies but the process needs to be explicitly managed rather than leaving the virtual team to its own devices if the collaboration is to be successful.

3. Formality and etiquette in online communication

Norms of email etiquette and formality vary for individuals and groups as well as across different organisations and cultures, but also depending on the situation (Vignovic & Thompson, 2010). If norms of formality are violated – for example, as with the email at the very beginning of the article language is perceived as too casual, the recipients feel less positive affect and liking for the sender and are also much less inclined to comply with any requests. A study with different status groups (instructors and students) found that recipients of emails perceived as overly familiar or casual were angriest with members of their own status groups, because they should know better; and tended to ignore requests most if the sender was of lower status (Axtell, Moser & McGoldrick, 2012). This is of great practical significance: both important information and requests might be ignored because of formality violations and lead to inefficient or even faulty work outcomes.

Email and instant messaging are of special interest, because they are still seen as a mostly informal means of communication and people tend to take much less care with wording, spelling and formality compared to writing a letter, which needs to be printed, signed and posted. I am currently extending this research in collaboration with a number of London hospitals to the area of health care, where electronic communication is increasingly important both between health care professionals and in-patient care (for example online counselling, e-health, NHS Direct) and to the area of inter-cultural communication with senders and recipients from different cultural backgrounds and different countries. For instance, the

common use of first names in the workplace in the UK might be perceived as completely inappropriate in a professional context or during a first contact in other countries.

4. Virtual collaboration across cultures

Teams and organisations operate more and more in a globalised world which includes going across organisational, national, and cultural boundaries – for instance when outsourcing services, as in Scenario 2 at the beginning of this article. Electronic media facilitate this development by supporting distributed work regardless of location, time zone, cultural background and organisational affiliation.

In a multicultural context there is an expectation for behaviour that is inter-culturally acceptable, for instance regarding the display of emotions in virtual work, such as anger, disappointment, happiness, and so on. Recent research comparing culturally homogenous with multicultural virtual teams (with members from China, Germany, Italy, Israel and the US) showed that participants from all countries saw a greater suppression of negative emotions as appropriate when being a member of a multicultural virtual team than when the team was culturally homogenous (Glikson & Erez in: Moser & Axtell, 2013). In addition, participants with a strong sense of global identity and experience in multicultural contexts showed greater agreement regarding what emotions were appropriate to display in multicultural teams than those scoring low on the global identity measure, indicating that this intercultural perspective can be trained and is also a matter of experience.

5. Trust is the 'social glue' in virtual collaboration

Trust is key in any collaboration, whether virtual or face-to-face, but the difference is that it is more difficult to develop a sense of trust in an entirely virtual context with fewer social cues and less or no opportunity for informal contact between collaborators. This is especially critical in ad-hoc global virtual teams, where team members do not know each other beforehand and only work together for a limited time, such as a task force. Current research shows that if there are early positive assumptions about the trustworthiness of remote team members, this provides the necessary confidence to engage in setting and discussing rules for cooperation. This then can develop into trust, and benefit performance if those trusting beliefs are further verified through normative actions such as scheduling, monitoring and joint tasks (Crisp & Jarvenpaa in: Moser & Axtell, 2013). A constructive experience provides the grounds for continued positive reinforcement, as these normative actions in turn become a sustained basis of trusting beliefs and subsequent performance.

The findings are of high practical relevance for virtual teams where there is no time to build relationships through recurrent personal interactions. They also again confirm the enormous importance of explicit rules for conduct, task division and so on in virtual collaboration compared to face-to-face interactions.

6. Degrees of virtuality: Co-locators, remotes and switchers

Other important aspects of current virtual work environments are the different degrees of virtuality and the switching between virtual and face-to-face collaboration, such as having parts of the team that are co-located and parts that are dispersed or team members switching between on-site and off-site work. This might result in incongruent norms being developed in the different subgroups. For instance, people working in the same building might have different norms for communication via electronic media than those who are dispersed. Due to less reliance on communication technologies, the email communication of those who are co-located is likely to be less detailed and more casual than of those who are working remotely. Co-located environments are characterised by informal, immediate verbal communication with the benefit of non-verbal cues (and thus co-located team members may be less mindful of writing emails that convey contextual, relational and social information), whereas virtual environments need to have more deliberate, explicit, and more disciplined communication rules with contextual, relational and social information in addition to the core messages.

Moving between virtual and face-to-face environments is thus a particular challenge. A recent study (Cheshin *et al*. in: Moser & Axtell, 2013) found that hybrid or partially co-located teams did indeed develop distinct communication norms, and that co-located groups often had difficulty when communicating with remote members as they had to switch from lean messaging within the co-located group, to making a greater effort and writing much more elaborate messages for remotes. The most important finding from a practical perspective is that norms regarding the use of electronic communication (such as email, instant messaging) persisted even when the media environment was changed. People were obviously not conscious of the different ways they used emails and the need to change their email style and content depending on whether they communicated with remote colleagues or with colleagues in the same office. This difference in electronic communication norms might cause an additional rift within distributed teams and impact greatly on team communication and performance if the processes are not carefully and explicitly managed.

4.4 Tips for Managing Virtual Collaboration Effectively

- **DO** always set explicit and if appropriate written *rules from the very beginning* for all virtual communication. **DON'T** just let it run. Regaining lost trust and motivation is very costly and even more difficult in a virtual context.

- **DO** set *minimal rules for email etiquette* to enhance trust such as: a) always confirm receipt of messages and b) always use a proper address and greeting in each message.

- **DO** discuss and monitor etiquette in multicultural contexts: there is no one size fits all for this as cultures differ too much in etiquette. Hence, formality rules need to be an *acceptable compromise for all members,* for example regarding use of titles, first names and so on.

- **DO** monitor the rules and their usefulness from the beginning, define explicit *feedback cycles for the monitoring,* and change the rules as appropriate.

- **DO** *always communicate when in doubt!* If unsure about timelines, agreements, division of tasks etc, always write an email to confirm! Remember: You would not hesitate to do the same if the person sat in the office next to you. You need to compensate for the lack of those informal contact opportunities with additional electronic communication.

- **DO** make special efforts for transparency because *trust is the social glue* also in virtual communication. In a virtual context, trust can only develop if you reduce uncertainty by being as transparent as possible about goals, division of tasks, rules of conduct such email etiquette, and so on.

- **DO** *train your staff* in the differences between face-to-face and virtual communication and choose *team leaders with experience in switching* between both and awareness of these differences.

- **DO** consider the *verbal ability of your team members.* Virtual work requires much more written communication than if you work in the same building. People with less education, less inclination (for example technical experts) or people not fluent in English might be at a disadvantage and not up to the challenges. Training can help here.

- **DO** make it clear to your team and your superiors that *communication management is one of your core tasks* in managing distributed work teams. **DON'T** underestimate the power of 'small things' such as email etiquette.

4.5 Conclusions

Virtual work requires much more frequent and elaborate communication and thus much more effort compared to traditional work settings. Things that literally work 'without saying' in a face-to-face context need to be made explicit, discussed and agreed on in a virtual work context. This is only possible if there is an awareness of the central differences in working face-to-face vs. virtually and if the employees have both the motivation and the ability to engage in that extra effort. This can be achieved through training, professional

communication management and the development of shared rules to build up the sense of trust and reliability needed for any successful collaboration.

Nevertheless, people are still rooted in their physical, social and cultural environment. Although they may seem only a click away – occasional and well planned face-to-face meetings can contribute greatly to building trust and developing a shared understanding of tasks and goals, on which further electronic cooperation can then be built.

4.6 About the author

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