



Case Study:

## Evolution of Virtual Team Training at a Multinational Advisory Firm

Large organizations grow and evolve over time. So why should training for their virtual teams stay the same?

To answer that question, first we must appreciate that working virtually is different from working face-to-face. Every aspect of communication — team meetings, check-ins, staff evaluations, employee onboarding, everyday collaboration — changes when you aren't physically in the same space. It is a very human challenge that requires a new set of communication skills and strategies.

Second, as this is a human problem, companies need to appreciate that as humans master one set of skills they naturally move onto the next, more advanced set. Static training programs do not accommodate this. The kind of support that teams require to excel in the virtual environment naturally changes over time, necessitating a flexible and dynamic program that adapts to their needs.

In this case study, we will examine the evolution of virtual teams' training needs through the example of one company in particular: a multinational advisory services firm that engaged Virtual Team Builders (VTB) to provide continuous training services over a period of several years.



## About the Client



The client is a multinational organization that provides advisory, assurance, tax, and transaction services that help solve their customers' toughest challenges and build a better working world. Well-versed in operating on an international scale, the client has worked on a distributed basis across continents for decades. Those distributed teams worked in silos, however, with teams consisting of staff pulled from the same geographic pool. It was rare for two or more team members to work apart from one another.

As virtual technology improved, the pressure was no longer limited to internal teams performing well. Cross-functional teams needed to collaborate across time zones and cultures. Client-facing teams would now draw from an international pool of candidates based upon expertise rather than location alone. This put great pressure on team dynamics as they needed to be more fluid in team creation, new team member integration, and team member exit should a person be assigned elsewhere.

The client contracted **VTB** in 2016 to provide ongoing support for their virtual teams, leading to a productive, multi-year training program that has evolved to meet their needs as they've changed over time.

## VTB Training Timeline

When working with a long-term client such as this one, VTB conducts regular reviews and assessments with management to ensure that the training program meets their needs. As a result, training has taken many forms and covered many topics since it began in 2016, all in response to changing needs and priorities within the client's workforce.



2016

### Client Priorities

- ▶ **Virtual Meetings**
  - Improve effectiveness and engagement
  - Drive participation
  - Minimize miscommunication
- ▶ **Virtual Etiquette**
  - How to build connections at a distance
  - Effective communication styles for the virtual office
- ▶ **SharePoint and Skype for Business**
  - Training on all features of the platforms
  - Effective collaboration at a distance
- ▶ **Leadership**
  - Effective management of virtual staff
  - Effective project management at a distance

In addition, the client requested that the program be convenient and flexible for its workforce, accommodating their busy schedules while also being frequent enough to make a lasting impact.



## What Is a Team Operating Agreement?

A team TOA is a comprehensive document that establishes a code of conduct for team interactions. Effective TOA's are created by the team members to ensure buy-in and are typically modified over time as team needs evolve.

They often cover topics such as:

- Meeting etiquette (coming prepared, no multitasking, staying on topic)
- Clearly defining roles and responsibilities
- Protocols around how we make decisions
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## Training Program

VTB devised an interactive Lunch and Learn program with four to five sessions per month that were open to all employees. Each session provided an opportunity for participants to learn new skills, share their experiences, ask questions and collaborate with one another.

Session topics addressed the client priorities identified above, with each session targeting a specific skill or strategy to provide attendees with tools they could put into practice immediately.

Training also included two longer, 2-hour sessions on the Team Operating Agreement (see sidebar for details) and How to Optimize Virtual Meetings. These sessions provided a more in-depth look at topics covered in the Lunch and Learns as well as specific skills on how to work together effectively in the virtual environment.

## Outcomes

Shortly after implementing the program, the client reported:

- Better on-time and on-budget performance
- Increased comfort and confidence with virtual collaboration technology
- Higher morale
- Lower attrition rates



2018  
2019

## Client Priorities

### ▶ Collaboration & Innovation

- Shifting from project-driven to innovation-driven mindset
- Breaking down silos

### ▶ Advanced Communication Skills and Management Strategies

- Move beyond virtual office basics
- In-depth knowledge

## Training Program

Responding to a need for more nuanced, in-depth learning now that staff had mastered the fundamentals, VTB introduced additional 2-hour sessions geared towards the client's immediate needs.

In particular, the client identified staff who were highly effective and project-driven but needed to develop a mindset of innovation as they transitioned into management positions. VTB custom-designed a course for this new group of leaders, empowering them to not only change their own perspective but to foster a spirit of innovation in the organization as well.

## Outcomes

The client reported that teams became more collaborative, reaching beyond their siloes to develop innovative workflows and solutions to meet their goals.



**2020  
and  
BEYOND**

## Client Priorities

### ▶ Microlearning

- Fast, efficient training sessions that target specific skills or concepts in a short amount of time
- Deliver training without the need to set aside large blocks of time

### ▶ Responding to COVID-19

- Adapting to work-from-home environments
- Communication practices for working in physical and social isolation, not just geographically dispersed offices
- Resilience

## Training Program

As of this writing, VTB has recommended developing a program of microlearning courses focused on quick, easy-to-learn strategies that team members can absorb without significantly disrupting their workday.

This shift is due in part to the Coronavirus pandemic, accommodating team members who face additional distractions working from home rather than in a remote office. Under this model, all staff will have access to the same training and skill-building resources, but with the flexibility to consume the lessons at their own pace.

# Summary



As demonstrated with this large, multinational client, the needs of teams that operate in the virtual environment are always changing and adapting. This means that learning for staff and managers never stops. Technology changes, goals change, and team members change, and circumstances change, constantly triggering a new set of challenges that must be addressed.

And yet, through these changes, the need for training remains.

Virtual team training is a versatile tool that goes far beyond simply providing knowledge on how to use the technology. It addresses the interpersonal, human side of teams, ensuring that staff and managers have the tools they need to build and maintain the trusted relationships that drive long-term success.

Done mindfully and with careful planning, virtual team training can adapt to any organization's needs as they evolve, providing staff with the resource and tools they need to achieve their goals and thrive.

- ▶ To learn more about what **Virtual Team Builders** can do for your organization, take our [Free Virtual Team Performance Survey and receive a 45-minute mentoring session.](#)