New Tools for Coordination and Leadership of Virtual Work

WORKSHOP SESSION 3

Doug Austrom, Betsy Merck,
Bert Painter, Pam Posey

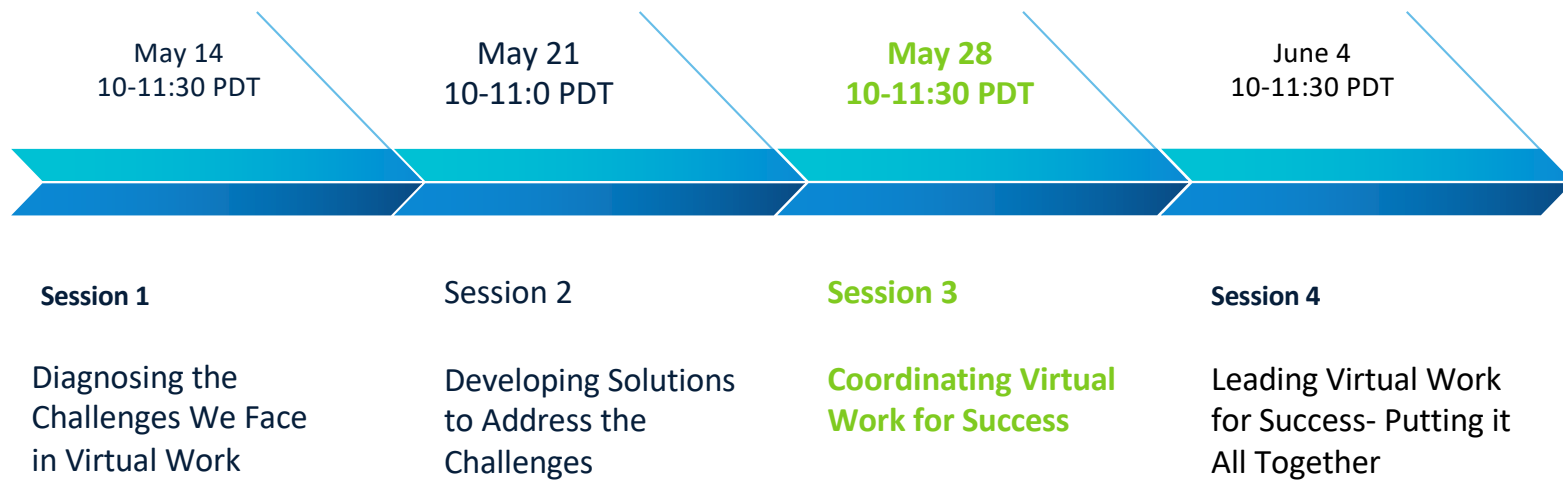**SOCIO TECHNICAL SYSTEMS ROUNDTABLE**

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- We are happy to share our work with you, and to have you share it with others.

- We would love to know if you adapt or build upon it, and to have you share that with us.

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- You are welcome to adapt or make changes in any reasonable way, but not in any way that suggests that we or the NSF endorses you or your use."

New Tools for Coordination and Leadership of Virtual Work

How the Series Works

| May 14 10-11:30 PDT | May 21 10-11:0 PDT | **May 28 10-11:30 PDT** | June 4 10-11:30 PDT |

Session 1

Diagnosing the Challenges We Face in Virtual Work

Session 2

Developing Solutions to Address the Challenges

Session 3

Coordinating Virtual Work for Success

Session 4

Leading Virtual Work for Success- Putting it All Together

Session 3 Objectives: Coordinating Virtual Work for Success

Reinforce our knowledge of barriers

What's the approach to resolve those barriers?

✓ Learn to design processes to better coordinate virtual individual and team effort and reduce knowledge barriers to success

TODAY'S AGENDA

- Welcome

- Workshop Overview and Session Objectives

- Participant Check-in's

- Key Concept: Knowledge Barriers

- Key Concept: Coordination Mechanisms

- Wrap-Up & Homework

Participant Check-in's

Please use the CHAT to share your questions and reflections about barriers to effective deliberations.

Deliberation Barriers You Identified

- Participants' lack of technical skills
- Technical barriers
- More exhausting to pay attention
- Potential mis-understanding and mis-communication
- More challenging to get spontaneity and incubation on ideas that then can be discussed informally
- High emotions
- High financial (cost increase, revenue decrease)
- Politics (narrow interests and agendas)
- History of previous problems and conflicts
- Not enough "chunking" of material.
- Identifying participants who have great ideas but would rather not contribute actively to the deliberations
- Ill prepared meetings
- A bias from senior leadership towards decision versus deliberative processes
- Multi-tasking (doings the things at the same time)
- Too much info sharing for exhausting medium
- Content of deliberations initially seen as same as if nothing had changed in terms of uncertainties
- Not focusing on uncertainties and getting clarity first
- Virtual takes more time
- Not focusing on uncertainties and getting clarity first
- Lack of high touch

Barriers* to Deliberation Effectiveness

Barriers	Examples
Knowledge sharing	• Lack of trust and cooperation • Conflicting goals/priorities • Unwillingness to share or involve others • Lack of serendipitous and informal sharing • Protecting proprietary intellectual property
Knowledge acquisition	• Not using existing data; incompatible data bases; imprecise analytics • Difficulties accessing relevant knowledge due to information overload • Lack of available information, data or external input
Frame of reference	• Language and cultural differences • Diverse work practices • Silo thinking • Mental models/paradigm blindness
Knowledge retention	• Poor documentation • Unclear document management procedures • Undefined/diffused responsibilities • IP Ownership conflict
Process, technology, and lack of presence	• Technology glitches; weak internet signals, software and platform limitations, etc. • Lack of planning and unrealistic time frames • Poorly managed forums/meetings • Screen fatigue • Lack of physical presence … "out-of-sight, out of mind" • Unshared tacit knowledge • Missing the non-verbal's … mis-reading emotions

Categories of Coordinating Mechanisms

Technical

Social
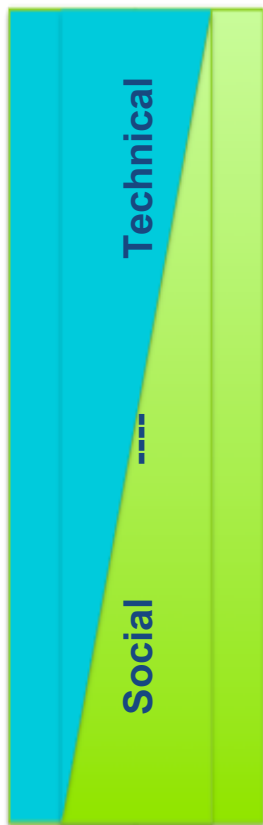
- **Standards - rule based**
  - Examples: data formats, standardized procedures, process standardization, output standards, standardized training

- **Plans – result based**
  - Examples: delivery schedules, project milestones, task/project management software, compelling 'mission'
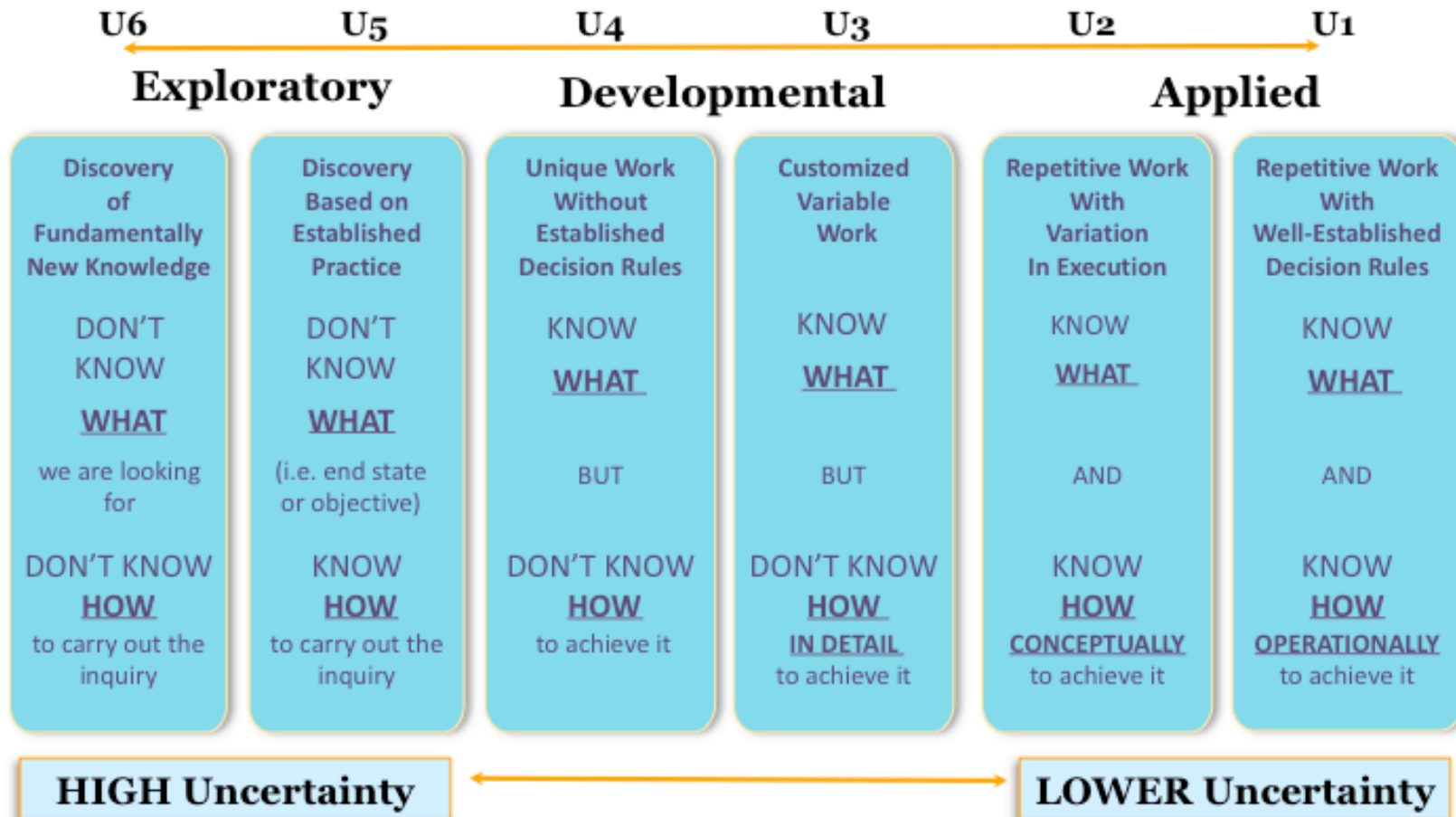
- **Formal mutual adjustment**
  - Examples: shared database/repository, content creation/communication software, formal meetings, task forces, networking roles

- **Informal mutual adjustment**
  - Examples: informal meetings/chats, impromptu communications, temporary f2f co-location

CONTINUUM of WORK UNCERTAINTY

U6	U5	U4	U3	U2	U1
Exploratory		**Developmental**		**Applied**	
Discovery of Fundamentally New Knowledge	Discovery Based on Established Practice	Unique Work Without Established Decision Rules	Customized Variable Work	Repetitive Work With Variation In Execution	Repetitive Work With Well-Established Decision Rules
DON'T KNOW WHAT we are looking for	DON'T KNOW WHAT (i.e. end state or objective)	KNOW WHAT BUT	KNOW WHAT BUT	KNOW WHAT AND	KNOW WHAT AND
DON'T KNOW HOW to carry out the inquiry	KNOW HOW to carry out the inquiry	DON'T KNOW HOW to achieve it	DON'T KNOW HOW IN DETAIL to achieve it	KNOW HOW CONCEPTUALLY to achieve it	KNOW HOW OPERATIONALLY to achieve it

HIGH Uncertainty ←————————————→ **LOWER Uncertainty**

Adapted by Carolyn Ordowich, STS Associates, Inc. from Andrew C. Revkin, R2-D2 and Other Lessons From Bell Labs, New York Times, Dot Earth Blog, December 12, 2008 & Eddie Obeng, Putting Strategy To Work, 1996, Financial Times Pearson Publishing.

COORDINATION
Across the Continuum of Work Uncertainty
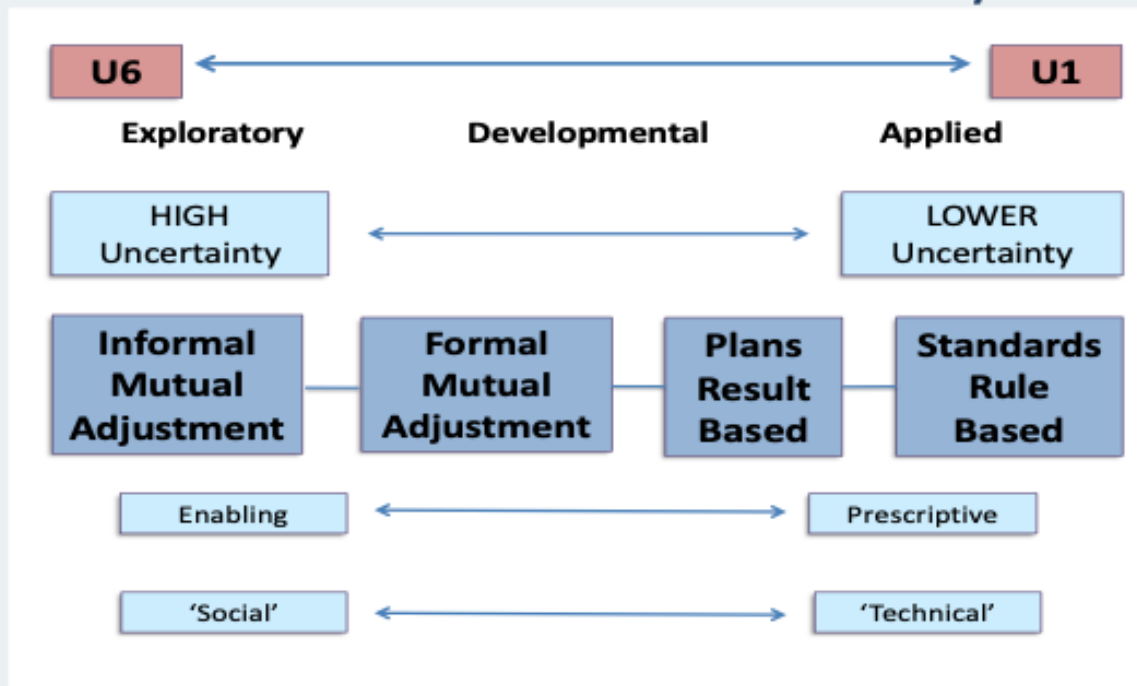
Breakout Group Activity

Total time: 20 minutes

Choose a spokesperson to report out on your discussions, questions and insights.

Directions

✓ Each of you will share the following …

  ✓ Location of your work on the uncertainty continuum

  ✓ A barrier you are experiencing or anticipate in your work.

  ✓ How do you currently coordinate your work?

✓ With your breakout group, discuss how you might improve your current approach to coordination.

✓ After 5 min, move discussion to the next person in the group.

What Did We Do Today and Where Are We Going Next?

Today's Key Lessons

- Categories of Knowledge Barriers
- Coordinating Mechanisms and Relationship to the Continuum of Work Uncertainty

What's Coming Up in Session 4

- New Leadership for Success in a Virtual Environment
- Putting it All Together -- Principles for Success

Homework

Before our next session:

✓ Reflect on the "leadership" challenges that you are experiencing or observing in your virtual work.

Don't forget to sign up for Session 4 on June 4, 2020, 10:00 - 11:30am PDT.

Thank you!

If you are interested in learning more about this work, a selection of readings, our Zoom session recording and our slide deck will be posted shortly on our website: www.STSRoundtable.com

Doug Austrom (daustrom@indiana.edu)
Betsy Merck (betsy@merckconsulting.com)
Bert Painter (gpainter@telus.net)
Pam Posey (pamposey@att.net)

See You Next Week