1. Case Study: Role of Communication in Global Work Group Projects

The term global work group as used in this paper is defined as a working unit consisting of individuals who are geographically dispersed, separated by time, geography and culture. They must effectively communicate and interact to achieve strategic organizational results [Grosse 2003]. What makes global work groups unique is that their area of focus usually falls under the umbrella of project or task focused endeavors that can spans across many organizational functions. As result, global group team members join a project, execute their tasks and move on. Today’s global work groups are probably best categorized by the term “ensembles” [Logeski and Riley 2008]. Like any ensemble, work group members need to be aligned on objectives and deliverables, understand their role and that of their peers and execute “performance” to the best of their ability. Communication, knowledge sharing and collaboration are hallmarks of working in global virtual environment (see figure on page 37) [Oakley 1998].

The following case study will demonstrate the role of communication in a corporate global initiative. What is unique about this case study is that two project implementations with the same solution, managed by the same project managers within the same corporate function, resulted in two different conclusions.

A global premier measurement company was looking for a solution for an enterprise wide contracts document management system. The corporation is one of the world’s premier measurement firms and a technology leader in communications, electronics, life sciences and chemical analysis. The company’s 18,000 employees serve customers in more than 110 countries and reported net revenues of $5.8 billion in fiscal 2008. One of the company’s major infrastructure functions had a technology need for a contracts document management
system. The function was a global infrastructure support organization. A team was assigned from the organization’s project management group to source a contracts document management tool that met specific requirements: secure storage and retrieval of contracts documents, ease of use and quick adoption by user, minimal system administration, global reach and cost effectiveness.

After investigating many commercially available automated solutions, the project team developed a very innovative solution that was not only efficient, but highly cost effective. They decided to use an existing enterprise wide collaboration tool – ECM Documentum’s® eRoom. The tool provided document management functionality and met a majority of the stated requirements. Originally, the tool was selected for document management of Commercial contracts in 2006. The project spanned 7 months. It was a truly innovative approach and achieved quick user acceptance as many users were familiar with using eRoom as a collaboration tool. (The first rollout is referred to in this paper as the Alpha Project.) With the success of the Alpha project, it was decided to apply the eRoom solution to the Procurement function. Procurement also had a need to replace an outdated contract document management system. This rollout is referred to throughout this narrative as the Omega Project. Each implementation was managed by the same project management group.

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Both projects followed standard project management methodologies and each had engaged executive sponsors. Alpha team was highly successful in meeting the project objectives: implementation of the solution and user acceptance. The Omega project team also executed the implementation of the automated tool flawlessly; however user adoption proved to be a major hurdle. After both Alpha and Omega phase were completed, the project team debriefed and conducted a Lessons Learned session. The purpose of conducting a Lessons Learned session at the conclusion of a project is to catalog what went well and what could have been done differently. This inventory is documented and becomes an organizational asset that should be reviewed at the start of any new project initiative. During the Lessons Learned discussions, it became apparent that one of the key differentiator for project success was the communication approach employed. A deeper investigation also uncovered a difference in the training methodology – Alpha employed face to face training sessions, where Omega’s training was conducted in a virtual environment.

Alpha team was the first to implement the eRoom contract management solution. The project management group is structured as a composite organization. (A composite organization is on that creates a group to handle strategic or special projects.) [Project Management Institute 2008] Two project managers were assigned to design and rollout the associated business processes and training associated with the new tool. (One of the techniques employed by the corporate function’s project management group is to apply “2 in-a-box” approach – where 2 project managers work together in the rollout of a large project. This approach affords flexibility and coverage in terms of project management bandwidth. It also improves decision making and problem resolutions as two individuals work in collaborative synergy to achieve the optimal outcome.) Alpha team focused on the sale side of contract management. Core team members and end users of the new tool were located in various regions around the world – Europe, South America, Japan, and Asia Pacific. As part of the rollout, face to face meetings were approved for both the data migration phase and user training on the new tool. The project managers met with the core team (made up of regional representatives) on bi weekly bases in a virtual environment and used virtual technology tools – phone conferences, WebEx® and email exchanges. However, during critical phases (data migration and training) the team did come together for a weeklong face to face meeting. Once the training of the core team regional representatives was completed, they returned to their regional offices to train their intact (onsite) teams. Each phase of the training was done in a face to face meeting. Upon completion of the training, all commercial contracts personnel began using the new tool and required very little post implementation support from the core team. After the implementation, the project managers monitored the situation for 30 days – and there were no user issues or technology issues with the tool.
Given the success of Alpha, it was decided by management to apply the same solution to the Omega (Procurement) environment. The organizational structure of the Procurement group was global in scope similar to the Contracts function. However, Project Omega was initiated in 2008 and was impacted by the downturn in the economy. Face to face meetings were curtailed with one exception: the face to face meeting for the core team to conduct the data migration. No users participated in the face to face migration phase. Data migration was successfully completed when the Omega team learned that training would need to be done in a virtual environment. Users were required to attend training sessions on how to use the new tool and its business application through WebEx® (desktop sharing technology tool). Unlike the Alpha training, there was no face to face training, even for the local intact teams.

It is important to note that the training was conducted in a “send and receive” mode where instructors used graphics on the WebEx screen while users listened via a conference call. There was very little interaction between users and the instructors given the time and technology constraints for the training presentations. Many users where from geographical regions where English is a second language. The amount of information was overwhelming for those who needed to translate simultaneously. There was no way for instructors to monitor users’ facial expressions or body language in the virtual training environment. This issue of simultaneous translation had been raised by the project team when the decision to conduct global training in a virtual environment was announced. However, given the financial constraints of the economic downturn there was no alternative but to conduct the training virtually. The project team’s awareness of intercultural communication issues can be attributed to the company’s focus on working in a global environment. But for the Omega team, economic prudence took precedence over face to face training sessions.

After the training, users began to utilize the tool and many experienced difficulties. It is important to note, that the solution implemented – eRoom – was a corporate collaboration tool that all users were familiar with. It was not the tool that was proving to be an obstacle, but rather users’ understanding of applying business processes (contracts document management) in the eRoom environment. Post implementation support became a major issue with many hours spent by the core team in addressing users’ issues/questions/complaints. It took nearly 7 additional months of support and the rollout of 1 on 1 virtual training sessions to reach stability.

What was the business impact of foregoing a face to face meeting? The most visible impact is the amount of time and labor dollars invested to address issues experienced by procurement users. Support by the Omega project team for additional post-implementation training exceeded the cost of travel by 67%.

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1 Project team calculated hours spend on post implementation support using a simple database and cost calculations are based on internal labor costs for a Full Time employee per job level. The
This additional cost is above the threshold set by research studies that suggests a 50% increase in cost can be expected if face to face meetings are not allowed for high impact global projects [Logeski and Riley 2008]. Not only was there a negative financial impact as a result of no face to face training, but it was a lost opportunity for Omega project team members to focus on other projects. Another consideration is the time that users needed to invest above and beyond the original training to grasp and understand the tool and its’ application.

Another differing factor in the communication approach, discovered during the Lessons Learned debriefing, was the frequency of communication with the executive sponsor. Both project sponsors were engaged and had sufficient executive power to resolve conflicts over resource allocation, schedules and funding. Both exhibited a keen interest in the project results and were advocates of the project. However, the sponsors had different communication styles and communication plans were adapted accordingly by the project managers. Understanding different leadership and communication styles of principle stakeholders – like project sponsors – is a core competency for a project manager. Alpha had regularly scheduled bi-weekly calls with the project sponsor to debrief with the project status and upcoming milestones. Omega’s communication schedule had a less periodic check-in schedule.

In analyzing the outcomes of the Lessons Learned from the Alpha and Omega projects, a few critical success factors are apparent:

– Frequency of communication within a global work group,
– Face to Face Meetings to complement virtual meetings,
– Importance of Global Collaboration Awareness,
– Importance of Lessons Learned.

But are these factors unique just to these two projects? Do project managers, work group members and executive sponsors ensure that enough attention and focus is given to these factors on each global project? To answer these questions, a survey was released to global project managers with questions structured around these four critical success factors.

2. Survey on Global Work Group Communication – Methodology and Approach

An online survey, consisting of 20 multiple choice and 4 open ended questions was conducted from 24th August 2009 through 6th September 2009. The responses were solicited from a targeted audience who had a minimum of 2 years experience in managing global implementations or engagements. These professionals were trained or certified in Project management methodology and/or Six Sigma™ or

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67% additional cost does not take into account the time invested by the users to attend remedial training. The actual cost is probably more than 67%.
IACCM (International Association of Commercial Contract Management) core competency training. The participants were experienced in managing global projects within their companies. No individual responses were analyzed, but rather all responses were consolidated. As the survey was global in scope, the introduction contained a list of Operational Definitions. This glossary of terms was designed to help assist the respondent when answering the questionnaire, as well as to ensure consistent understanding of survey terms. The surveys analyzed (N=130) represents a small sample size, however, the distribution of regions are well represented with 48.8% from the Americas, 34.9% from EMEA and 16.3% from Asia Pacific. Industry representation in the sample spanned 15 different industries: banking, constructing, engineering, retail and technology to name a few. A large majority of respondents (83.3%) categorized their project used for the survey as a success.

The data gathered from the survey questions on COMMUNICATION (questions 3 through 8, 10 and 11.), presents an interesting picture of 21st century global work group communication. Less than 1% of projects had only face to face meetings. Over 80% utilized a combination of face to face and virtual meetings, while 28.5% had all virtual meetings. This data underscores the impact of advances in collaborative technology tools that allow global projects to be conducted. Today’s global companies are information based, electronically connected, and work is completed online. The term “virtual work group” [Lipnack 1997] coined in 1991 has now become an established model thanks to communication technical innovations. A key collaboration tool used by most respondents is Cisco’s Web Ex®. It is considered to be one the most effective technology for conducting business in the 21 century. [Economist 2008]. The tool allows for real time, interactive knowledge sharing for geographically dispersed group members by combining online visuals with conference call capability including audio and visual recording. Based on the feedback from respondents, communicating and working in a virtual environment did not hinder their ability to complete their objectives. Only 20% experienced an extended project timeline as a result of virtual communication and only 18.5% felt that project deliverables were impeded by communicating virtually.

Respondents did indicate that frequency of communication was more important than the method of communication for ensuring project success. Continuous communication is a critical strategy that needs to be employed when managing virtual work groups [Grosse 2003]. 67.7% had scheduled weekly or bi-weekly meetings with their global work teams and 20% had daily communication with their work groups. Frequent communication was seen as a critical success factor for achieving highly participatory levels of engagement of work group members: 59.7% of respondents had high level of member engagement and 38% had adequate participation. Frequent communication by global work group project leads creates a virtual environment that suggests to group members
a sense of supportiveness, participation, trust, openness and collaboration. Ongoing dialogue with global group members diffuses misunderstanding and deflates mis-information. The project group lead needs to establish credibility with the global work group. Credibility, coupled with competency and sincerity form the cornerstone of establishing trust with group members. These factors are critical for ensuring progress and success for the global work group [Buzzanell, Shohl 2009]. Continual communication is not just about project status and schedule updates. Open communication must include setting clear and specific roles and responsibilities; defining achievable goals and objectives; and continual feedback on work group member’s performance [Eisenberg, Goodall Jr. 2001; Drucker 1999].

The same can be said of the importance of frequent communication with the project sponsor as 94.6% of respondents had ongoing and scheduled updates with their sponsors. Level of sponsor engagement that was characterized as highly participatory was 58.1% and 24.8% considered sponsor engagement as adequate. Executive leadership, participation and communication are critical to any global initiative. The ability to effectively communicate at the interpersonal, group and organizational level is a core competency necessary to ensure organizational goals and objectives are realized. Executive sponsors need to apply these core competencies at the tactical/project level especially in a global environment [Gundling 2007].

Although communication technology can bring global work members together virtually at the same time, it cannot completely mitigate the impact of time zones. Global group work members need to identify the “time zone” factor as a major dependency from the onset of the project/initiative [Reyes 2009]. Everything from scheduling virtual meetings to finalizing a project deliverable will be impacted by the time zone in which team members reside. The farther apart team members are located geographically, the more time zones they have to cross to communicate. Time becomes a major factor when work tasks need to be synchronized. And the window for synchronization (real time communication) decreases proportionally to the increase in number of time zones represented by group members.

There is a potential for communication to default to the asynchronous mode (one way communication such as email) if global project leads are not proactive. Communication must be scheduled so that all global group members share the “inconvenience factor” of attending virtual meetings during “off work” hours. Many global work groups are aware of the impact of “time zone inconvenience” as it usually addressed when scheduling virtual meetings at the onset of the project. However, it is important as the project proceeds, that the timing of meetings being periodically re-visited to ensure against “Standard Calling Mode”. “Standard Calling Mode” is when one specific global time is set for meetings – with one time zone constantly experiencing the “inconvenience factor” and it
is never re-visited. This is because as higher project priorities take precedence as the global initiative gains momentum, conference call scheduling takes a lower priority. Global work leads need to implement a “sanity check” throughout the project schedule to ensure that scheduled virtual meetings are not putting on a particular time zone at a consistent disadvantage.

It is not only the world clock that needs to be taken into account on a global project. Global work groups must understand that each culture has its own sense of temporal dimension: “What does on time mean?” to each global member [Levine 1997]. Cultural differences among global group members can give rise to issues during conflict resolution. The idea of time has hidden dimensions that can confuse communication among members. In the West, the concept of time is viewed as a linear event, where in the Eastern world, time is seen as “looping process”. It is important at the start of a project or engagement that global group members address the difference in time perceptions to mitigate potential misunderstanding and conflict [LeBaron 2003].

Given the explosion on online resources, global team members have access to learning and understanding the “temporal” dimensions of their peers at their fingertips. Some examples of such tool are Aperian’s GlobeSmart®, the Dr. Geert Hofstede™ Cultural Dimensions Center for consultative online web tools for assessing cultural differences. Cultural awareness prep work should be a mandatory project deliverable on a global initiative.

Responses to questions on the importance of FACE TO FACE MEETINGS (Questions 9, 13, 14, 16–19) indicate that onsite meeting for global work groups are essential: 70% surveyed considered the impact of meeting face to face as positive. Improved communication (30.2%) and Better Cooperation and Collaboration (42.6%) were cited as positive outcomes of face to face meetings. Face to face meetings were cited among the top tier critical factors for ensuring project success. Management approval for funding face to face meetings occurred mostly when the project was strategic in nature and had the potential of management of change issues (52.0%). Many respondents did cite lack of budget or executive sponsorship for failure to secure onsite meetings for their virtual teams (34.4%). This is an important consideration for global corporations – to weigh the impact of cost of face to face meetings against lost opportunity costs. It is estimated by the year 2012 that 40% of multinational corporations will be working in a virtual distributed environment [Domick, Reilly, Lojeski 2007]. It is also incumbent on global project leads to ensure that s/he makes a very strong case for justifying the need for a face to face meeting. Research conducted on effective virtual teams over the years, almost universally attribute a least part of a team’s success on an effective start up face to face meeting [Fisher &

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2 Complete survey is available as an Appendix.
This is especially true at the onset of a global project or a global project that will require training [Grosse 2003; Gisson, Cohen 2003; Kirkman 2004]. Alignment and commitment from global group members takes much longer when face to face meetings do not occur. Meeting and sharing ideas at an onsite venue, enhances understanding, aids collaboration and innovation while minimizing potential misunderstandings and conflicts that can arise during a long term project [Kerber, Buono 2005].

Responses to questions on the impact of MULTICULTURAL PROJECT TEAMS (Questions 12, 16 and 17) indicate the multicultural make up of a global group is not a major critical success factor or a major inhibitor to project success. Only 10% of those surveyed felt that a multicultural team was a divisive element, while 51.9% experienced no impact and 37.2% responded that the great synergy from a multicultural team accelerated the project execution. In terms of project success, multicultural team composition was rated last as a critical success factor. In exploring the major factor for a project failure, again a team’s global makeup was rated as the least important factor for project failure.

There are several reasons for these results. A work group composed of members from various cultures and geographies has long been considered a competitive strength. In 69 AD, the Roman Emperor Vespasian, exploited the notion of intercultural synergy, and consciously placed various ethnic groups within the legion units to improve military strength [Grant 1997]. In the 14th century, monks staffed their scriptoriums with copyists, linguists and illustrators from around the world to support their mission to copy and preserve books from around the known world. The work required a multicultural team [DeHamel 1992].

Today’s global corporations also recognize the strategic importance of multicultural work groups. By shifting work across time zones, there are several key strategic benefits to be gleaned by multinational corporations [Thondavadi, Albert 2004]: access to deeper talent pool product and process innovation, cost efficiencies to mention a few.

Knowledge sharing is also enhanced by the multicultural composition of the work group. As group members take advantage of different perspectives, talents and ideas, their synergy increases an organization effectiveness to compete on the global stage [Cummings 2004]. Effectiveness and efficiency is the hallmark of 21st century successful global enterprises. In the age of globalization, multinational corporations need to employ, engage and educate their multicultural teams on the importance of collaboration. It is tantamount to business survival.

What is critical to achieving the synergy of multicultural work group is to ensure that specific goals of the project are clearly communicated to group members. The second action that needs to be taken into account, is to communicate to group members that collaboration will ensure their place with the organization. A finally, the corporate culture has to be the “stated” framework within the group members work. A focus on a common culture (the
corporation) will help to join various cultural members under the same umbrella as the project moves forward [Caruso, Rogers, Bazerman 2008].

The survey posed two questions around the topic of LESSONS LEARNED (question 15 and 20) Only 14% of respondents did not conduct Lessons Learned. The 86% who did formally debrief after the project was completed, focused on critical communication issues as part of the debriefing: Team engagement (57.9%), Communication Plan (54.5%), Role of project sponsor (44.6%), Role of Virtual Communication (41.3%) and Training Methodology (32.2%). These results are not surprising given the profiles of the respondents. Lessons Learned, also known as Reflectives, Debriefs or Post Mortems are standard practices within communities of interest such as project management. Most respondents had been trained in structured processes and methodologies that focus on the importance of reviewing various aspects of project processes – especially communication. Lessons Learned are basically a “story telling event” where group members relate their perspectives on the project life cycle.

There are many benefits to conducting Lessons Learned. Each member brings unique insights to the conversation. The conversation is a valuable knowledge sharing practice for participants. Group members recount what worked and what can be improved on future engagements. The group members’ “stories” captured in a Lesson Learned document become part of an instructional support system for future projects, helping others to apply best practices and to avoid painful pitfalls [Tobin 2007]. The process of reviewing Lessons Learned before the start of a new initiative should be a mandatory undertaking for every global work group. The value of Lessons Learned can best be summed up as: There is no wisdom equal to that which comes after the event. Geraldine Jewsbury – English literary critic and author (1812–1880). By conducting a Lessons Learned event, the global work group also reaches closure on the project. This is important as global work groups tend to break up as an entity and members move onto other projects. A healthy introspection by global team members allows them to acknowledge their efforts and celebrate their successes. They are now ready to move on to their next assignment [DiTullio 2007].

For the open ended question section of the survey (Questions 21–24), 87% of respondents provided detailed comments and suggestions. Many major themes emerged around the importance of face to face meetings, importance of communication, role of project sponsor and the impact of multicultural teams. Many of these recommendations from business professionals managing global initiatives, echo the findings an in-depth analysis of working patterns in virtual projects [Khazanchi, Zigurs 2005]. The following sets of maxims were derived from the central ideas provided by the respondents to specific questions on the survey: role of communication framework; role of multi-culturism in global work groups; role of sponsor engagement and ideas for improving communication on projects involving global work groups.
Maxims for the Project Leader of a Global Work Group Project/Initiative:
I. Rotate time of virtual meetings
II. Stress the corporate culture over local culture
III. Encourage sharing “stories” to find a common personal bond
IV. Communicate often at the group and individual level
V. Clearly define roles, responsibilities and expectations
VI. Proactively encourage regional inputs/ideas
VII. Invest heavily in relationship building
VIII. Communicate, engage and collaborate
IX. Conduct “Lessons Learned” from a business and personal perspectives.
X. Celebrate the group’s success

Maxims for the Executive Sponsor of a Global Work Group Project/Initiative:
I. Be Committed
II. Demonstrate support through words and actions
III. Conduct weekly check in calls with global team
IV. Have meaningful dialogues
V. Run Interference when obstacles are encountered by the global team
VI. Shield the global team from corporate politics, distractions
VII. Keep the global team grounded and engaged
VIII Communicate, Engage and Collaborate
IX. Always practice generous listening
X. Be a Leadership Mentor/Role Model

3. Conclusions
A global work group is a living organism that is dependent on communication for ensuring viability and productivity. Communication not only provides the necessary linkages for requesting and sending information, it also acts as a conduit for building relationships, defining roles and responsibilities and sharing of the global work group’s objectives. Working in a global work environment is feasible and productive in the 21st Century due to the advances of technology. However, attitudes, behaviors and awareness of time and culture by global work group members are more critical than ever. Leaders and managers of large global initiatives need to proactively educate their work groups on the most productive ways to work virtually.

Most multinational corporations recognize that to survive in today’s competitive environment, communicating in a virtual environment across cultures must be a core competency. By synthesizing the learning of academia and industry communities of interest, most large global firms have overcome the communication barriers of the virtual world. The level of success depends on two critical strategic factors: (1) implementing state-of-the-art communication technology and (2) a corporate focus on educating employees on collaborating
globally. But working around the obstacles of time zones and cultural differences is not easy to navigate. It requires careful planning and execution.

Abstract

Today’s global work groups depend heavily on timely communication, employee empowerment and cultural awareness. Global work groups, consisting of individuals who are geographically dispersed, must effectively communicate and interact to achieve strategic organizational results. This unique situation requires managers and employees to adapt to new ways of communicating. Current technology offers a plethora of solutions, tools and processes for networking. But does technology competently provide globally, dispersed teams a meaningful platform for communication? What is the optimal communication method for bridging cultural differences within a global work group? Should a global enterprise adopt a single approach to overcome the communication barriers of time and geography? Companies today constantly wrestle with these questions in their quest for global operational excellence. This research paper will explore the most effective global work group communication framework using a comparison of two global project implementations, identical in design and implementation – except for the communication plans employed. This real life case study will explore how differing communication models led to success in one project and ineffective results on the other.

References


