

Virtual Tools Increase Member Engagement and Project Performance

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Abstract

Project teams and professional societies, such as IPMA-USA share many of the same challenges: competing priorities, reduced availability of needed resources, and increasing costs of travel. The purpose of this article is to explore ways to use available technologies to achieve two objectives: increase society communication and engagement, while also building greater project management competences in virtual communication.

Note: we wrote this article for IPMA (International Project Management Association), and have modified it for IPMA-USA's use.

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1. Fighting the High Cost of Travel

The cost of travel is rapidly increasing—and *it will get worse*. This cost increase affects IPMA-USA, and our individual PM practices as well. Continent-spanning projects see the impacts more than most. Whether the purpose is team meetings, customer contacts, implementation site visits or supplier/partner contacts, we can expect the costs to escalate.

The cost of the lowest-price airfare from the USA to most European destinations has doubled in the last year. And while intra-European airfares are still a relative bargain, even they creeping upward. Asia remains a relative bargain—but just for now.

Some of the same Meeting Management methods that could improve face-to-face gatherings become essential as we move to increased virtual interactions.

Factors that improve effectiveness include better preparation, tighter agenda control, professionally facilitated sessions, where needed, and stronger chairing of sessions, and quicker follow-up with minutes and actions.

2. Virtual Communication Types and Options

Analysis of different communication types helps establish the most appropriate conventional and alternative communication methods. For example:

Collecting information can be done electronically, with web-services-based surveys and a bit of interpersonal follow-up. Collecting information from stakeholders increases their sense of ownership in the result.

Informing is effective with email, newsletters, social networking forums and paper-based documents and reports. One downside here is the flood of emails everyone already receives, and that does not include spam. (Our tech advisors say that unless we kill spam, email will die.)

Exchanging information tends to work best in face-to-face meetings, although some of the tools in this paper can help in this area. The key is to maintain interaction among multiple parties concurrently.

Decision-making involves more complex interactions than Exchanging information, because you are looking for commitment, and persuading others to take action.

Finally, *Governing* (project or society) is an essential and difficult communication process, with special traceability and transparency requirements needed to meet legal, regulatory or Enterprise standard processes, while maintaining stakeholder ownership.

Whether your current communication is in-person or virtual, project teams are increasingly using technology to improve communication—and reduce or eliminate meetings—all with varying levels of success.

Of course, these categories barely touch on the very special trust-building interactions that we must achieve during the face-to-face meetings early in every project, and every professional society relationship you engage in.

Considering these communication purposes, this document explores different aspects of technology-supported communication. However, one prerequisite to success exists for any of the options. Just as with face-to-face meetings, the participants must be well prepared to interact, and then engaged in the process and technology, seeing the benefits to themselves and their organizations for remaining so. Otherwise, they may be busy reading their email or bidding on a purchase during your remote interaction.

3. Teleconferencing Options

Teleconferencing involves more than two participants interacting by telephone to *exchange* information or *inform*, and sometimes *collect* information. Teleconferencing effectiveness improves with use of concurrently shared source information from a website. Effective use involves a number of considerations, all of which apply in most of the Virtual Communications Methods.

Timing: this consideration includes the time of day and day of week. The greater the time zone separation between the conferees, the harder it is to schedule convenient timing. The 8-10 hour offsets between Europe and Colorado, USA, for example, suggest that an 8AM US / 4PM UK conference can work. Calling the other way, from USA to China or India, can involve a similar time offset. Combine all three areas and someone is up very early or very late.

The day of week also matters—beyond the date line confusion of which day it is; many Middle-Eastern countries have a different weekend than the USA does. And, some people prefer to do their volunteer work on their weekends—others have their employers' approval to do this work during their workweek. Thus, the first challenge for any potential teleconferencing group is to figure out their timings.

Voice mail is really just specialized teleconference asynchronous informing, on a one-to-one basis.

Services: A range of paid and free Telecommunication services exists; several examples include Skype and other internet-connected options, plus conference-calling services that use telephones and conference-call log-ins. Clearly, internet-based teleconferencing services have cost advantages, given fast web access. We have used Skype for multi-hour conference calls worldwide for several years, and the drop-out rate is low, with voice quality very high. Add (up to 2) webcams and it is even better!

Session Support: Effective Teleconferencing depends on a range of services to support preparation, including the materials to share. Easy-to-access folders or compressed packages that can be instantly uploaded or downloaded are essential. This is easy to do from any SharePoint or Social Networking site. In addition to preparation support, concurrent “in-session” modifications can be especially useful, as we have seen in use of Google Docs for concurrent editing of the same document.

Limitations: Typical limitations of teleconferencing include short attention spans in larger (more than 5-7 participants) or longer (more than 15 minutes) sessions. They can be expensive, if standard telephone services are used. Background noise is a problem, if any participants are using speakerphones. Some services allow the Teleconference administrator to mute all or some participants to overcome noise problems, such as barking dogs or crying kids. *And you said you are in your office?*

4. Web-Conferencing Options

Web-conferencing involves multiple participants *exchanging* information in actions ranging from passive observation to full interaction using their computers and fast web connections. Typical features include live video of the speaker, and at best with 3-5 of the participants at a time, shared desktops (for presentations), whiteboards (for spontaneous recording), polling, private or public side-chats, and hand-offs to presenters from different locations. Again, effective use involves a number of considerations:

Timing: Web-Conferencing can either be synchronous (all participants are active at the same time) to serial (participants record current observations for later response by other participants) to asynchronous

(pre-recorded live sessions are observed later by others, usually without interaction, aside from captured feedback. Sometimes these sessions can be edited and tagged¹, with a viewer able to jump to a specific topic in a session). Cost and scheduling convenience, together with the needed richness of the communication are the primary determinants of the most appropriate timing for your application.

Services: A range of paid internet-connected services (all have free trials) exist including WebEx, GoToMeeting, Microsoft's Live Meeting, and Adobe's Connect. Many other smaller and less-well-known services also exist, such as Dimdim, Yugma (now affiliated with Skype), and Vyew. Of course, there is also Microsoft's venerable Net Meeting.

Session Support: In addition to evaluating typical Web Conferencing features, there still exists the need for shared documents, texting between participants, and post-session follow-ups or action items. The sessions themselves may be rich and useful, but without the needed extended preparation and follow-up support, you fail to gain maximum possible value.

The web-conferencing technology is improving, but so must our habits. For example, when webcasting with a camera, it is important to watch the camera, so viewers perceive you are looking at them, rather than looking at your image, or the slide or graph you are explaining—or turn off the camera until you get to the question-and-answer session.

5. Video-Conferencing Options

Video-Conferencing differs from Web-Conferencing in that it typically uses television technologies, rather than web software. Until recently, the two technologies were totally incompatible. Long the domain of Universities, there are many networks of schools that regularly collaborate using this technology.

Given the underlying television technology, the best feature includes great video of all participants, usually with a bank of several monitors, with one large screen showing the current speaker, but with smaller views of other locations.

This is very useful for a speaker who wishes to watch the reactions of his or her listeners, or to see the face of a person who is asking questions.

With such cool features as speaker selection based on who is on the microphone, the interaction comes very close to in-person level of experience. The ultimate experience we have seen, with multiple virtual rooms, given a back-projected screen at one end of your conference room, and other conference rooms similarly equipped, the biggest challenge is cost and bandwidth. For others, Cisco's new Telepresence² product line, perhaps paired where appropriate with their WebEx web-conferencing solution, might be an option if you can afford \$200k USD per site.

We piloted a combined Web-Conferencing and Video-Conferencing session last year. In our trials, we had great interaction with our friends from IPMI (Institute of Project Management, Ireland), but across the USA, we just could not successfully marry the two technologies, web and television video. We will continue to experiment with these technologies as the mature and as interest continues to grow.

6. Social Networking, Forums and Blogs

Social networking sites (often cited as part of Web 2.0), such as IPMA-USA's LinkedIn site, provide a way for informal *exchanging* of information, plus a bit more structured *informing* and *collecting*. These sites are especially useful in projects with a large group of distributed stakeholders, such as a professional society in a large country, or a widely distributed international sales team.

The upside: these types of Social networking sites keep people engaged in a relevant theme. The downside is yet another login for the participants. And, many of these sites can be popular one month, and out of favor the next. Most require some sort of "cheerleader" to keep them going, or at least regular (as in weekly) useful information or interaction to keep people active. Some specialty groups, such as on Facebook and LinkedIn, fill this role and are very useful as a research source that can engage a wide range of PM experts.

¹ Noted with a searchable keyword.

² All trademarks are the property of their respective owners.

SharePoint is a Microsoft *networking and more* service. It is useful for *exchanging* information and *informing*. It also has very useful *collection* functions (through its surveying capabilities), but those features are well hidden for casual users. Not that SharePoint is bad—it is very powerful and flexible, and it appears to be the centerpiece of Microsoft’s Web 2.0 efforts for the next several years. Perhaps this is happening already: past IPMA-USA Director of Member Services John McHugh says the new version is great!

Recommendations: Identify and establish “site keepers”, who will frequently stir the audience if you use such a site for a larger audience (because larger audiences tend to have more inertia). Encourage special sub-groups to form and interact. Use such sites to publish information for members of groups and teams to exchange information with each other.

7. Web-Based Training and Blended Learning

Given the progress of new technologies, and our ability to harness them, existing applications will see increasing benefits. For example, Web-Based Training is now a mature technology for those who have mastered it. Some are breaking the classic barrier of 2-hour sessions, and the audience attention spans are improving, for those who understand how to facilitate in this medium.

One IPMA-USA member, Dan Myers, of Requirements Solutions Group (and a business partner of Goff for over 25 years), has been a leader in this area. He and his co-owner in the firm, Tom Hathaway, use WebEx to hold regular webinars, with paying participants. At some point, we hope to post a more detailed report of their processes, and perhaps their secrets... and their outstanding results.

Blended Learning, where asynchronous reading and web-based conferencing are mixed, is already popular at Universities and in some Enterprises. It combines the advantages of independent study and research with instructor-led coaching and assessment. This area will only get stronger.

Virtual Coaching is already available for some, but is coming soon for the rest of us. Need to prep for your IPMA Level B assessment? Interact with your Virtual Coach! While web-based or classic instructor-led

training can be useful in preparing for Level D knowledge-based exams, the only way to assure readiness for higher levels of competence-based certification assessment is through coaching and mentoring. Some of us already perform these virtual coaching services, and the technologies we discuss in this paper enable many more to do so.

8. Other Applications

Wh@txtg? We realize that an increasing number of project teams prefer to communicate primarily with their thumbs—especially our younger generations. Texting is another topic all by itself, as the advantages and disadvantages could create quite some dialogue. This is now a key part of today’s project communication, and just as we determined in the early 1980’s with email: harness it or it will control you!

Et. Cetera: In other technology-assisted communications, the author of this paper participates in Podcasts, promoting IPMA, IPMA-USA and Competence-based certification. We are preparing Webcasts, in addition to our progress with social networks, web-conferencing, and webinars. But many other applications also hold promise. Here is a list of applications that are worth pursuing, as we learn more about the strengths and weaknesses of virtual collaboration.

Full Audience interaction, as envisioned by Les Squires for the 2008 IPMA Roma Congress, features virtual collaboration of Congress attendees, speakers and track chairs. This would begin long before the Congress, allowing dynamic interaction between audiences before and long after each event. We tabled it for Roma, but it remains an option for other events. Even potential attendees could participate, providing a differentiating factor for our organization in the face of hundreds of competing conferences.

Society internal interaction: Board meetings, committees, and projects could all either streamline sessions or reduce the number of actual meetings, given proper use of today’s technology. Our experience has been that you want the first one or two meetings of a new project team to be face-to-face, plus occasional re-visits, but some teams can get more done with reduced travel (while significantly reducing costs).

And what about our interaction with our IPMA-USA members? We have a website and bi-monthly newsletter, but our only interactive resources are in the Members Only area. Those who participate in IPMA-USA's exciting projects get great involvement and interaction—but what about all the rest of us?

IPMA-USA and Our Public: IPMA-USA has seen rapid growth in our first seven years; yet we must still accelerate our ability to get our message out to an audience that is anxious for PM improvement. Part of our solution is to use the technologies we discuss in this paper. Target audiences and their interests include:

- Certificants and candidates for competence-based PM certs are a willing audience for our message.
- Enterprise Executives will find our emphasis on Organizational PM Competence to be of great value, and key to their strategic positioning.
- Especially-eager are participants of projects managed by those who have not yet learned how to *Demonstrate the competence difference™*
- Smart PM Vendors understand the competence difference, and use it as a differentiator.

9. Conclusions

Proper application of the technologies discussed in this article will improve communication, interaction and engagement in projects or professional societies such as IPMA-USA. But meeting these objectives goes beyond just a technology solution. Face-to-face meetings are still the richest communication two persons or a group can experience.

In face-to-face venues, IPMA-USA already has held a series of successful PMCoPs sessions (Project Management Communities of Practice), and we continue to work with groups that are interested in forming IPMA-USA Chapters.

We will soon announce and hold another Congress. We are also considering a series of Nationwide Executive Breakfast Meetings to carry our message, *Demonstrate the Competence Difference™*.

Communication is a Project Manager's most important competence; everything else we do relies on it. Improving it, for both our face-to-face interactions and our virtual opportunities, requires the same steps needed to build any new competence: Learn about it, develop skill in its use, and learn to adapt available methods and tools for the situation, wrap it in our interpersonal skills, and achieve new competences.

We welcome your comments, thoughts and suggestions about this open-ended topic! Either respond using the email address below, or visit our website.

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A Project Management practitioner since 1970 and PM consultant since 1982, he improves Enterprise or project team PM competence, efficiency, and Performance. Mr. Goff speaks at industry events, offers coaching and consulting services, and presents workshops of great interest to Executives, Managers, Project Managers and leaders, technical staff, and individual contributors.

