

Virtual Proposal Teams are both increasingly common and necessary. Proposal managers must complete the same tasks in a virtual environment that are required when managing a co-located team.

Organizations are increasingly using virtual teams to prepare large, complex bids that were once exclusively prepared by co-located teams.

Teams are small groups of people with complementary skills who are committed to a common goal. Virtual teams are small groups of people who primarily interact electronically and may occasionally meet face-to-face to accomplish a common goal. Whether virtual or co-located, proposal teams have the same goal, preparing a winning proposal.

Organizations are driven by several factors to increasingly deploy virtual teams to complete a variety of tasks, including crafting proposals. The primary enablers and drivers are:

- Increase in broadband web connectivity and web collaboration tools
- Increase in travel costs
- Increase in employees working from home or remote locations
- Expansion of multinational organizations
- Expansion of services that do not require a central production site
- Access to lower labor costs in emerging markets or unique personnel in remote locations

Proposal professionals disagree over whether virtual proposal teams work. At the 2005 Association of Proposal Management Professionals (APMP) national conference, one speaker declared, "Virtual proposal teams do not work. Do not use them." Several other speakers countered that their virtual proposal teams were not only successful and cost effective, but that they could not meet their customers' demands and senior managers' directives using any other approach. At each subsequent conference, presenters discuss ways to improve virtual team management.

Research on high-performance teams and virtual team management is extensive and active. Here are some trends in how organizations use virtual teams:

- Larger proposal teams are less likely to be virtual, although some contributors might be virtual. Virtual proposal teams tend to be smaller (3 to 10 members).
- Virtual proposal teams often have shorter response deadlines (5-10 days).
- Virtual proposal teams tend to be concentrated in the non-government and multinational market sectors.
- Virtual proposal teams tend to sell relatively similar, modular services and products, and use more boilerplate in the proposal.
- Co-located proposal teams predominantly serve organizations that sell larger, more complex, higher-risk systems.
- More organizations are using virtual proposal teams for large, complex bids that were once prepared exclusively by co-located teams.
- Most proposal teams have virtual contributors, and most contributors operate virtually to some extent.

Virtual teams do sometimes fail. Senior management and virtual team managers will sometimes need to shift to a partially or fully co-located team.

The following guidelines focus on aspects of virtual team management that differ or require greater emphasis than when managing a co-located team.

Virtual Team Management

1. Exploit the advantages and compensate for the challenges of virtual teams.
2. Establish and maintain a *high-trust* environment.
3. Define and assign key virtual team roles clearly.
4. Establish clearly defined, discrete tasks.
5. Select task-appropriate, easy-to-use technology.
6. Over communicate.
7. Distinguish team management, leadership, and member motivation.
8. Establish virtual meeting ground rules.
9. Establish a rigorous review structure.

1

Exploit the advantages and compensate for the challenges of virtual teams.

Many organizations, business development managers, and proposal managers prefer co-locating their entire team, but have little choice; they must increasingly use virtual proposal teams to offset the challenges shown in figure 1.

Virtual proposal team managers face social and technology challenges. The social challenges require managing, motivating, and coaching team members. The technology challenges require tools to monitor tasks, schedules, and performance quality and are usually easier to address. Technical challenges are addressed in guideline 5.

Common social challenges are low individual commitment, role overload, role ambiguity, absenteeism, social loafing, and limited and/or conflicting management priorities. Consider these social challenges:

- Team members in different time zones resent inconveniently scheduled meetings.

- Critical decisions are delayed because key people cannot find common meeting times.
- E-mail or off-hand teleconference comments are misconstrued, causing confusion and distrust.
- Time and resources are wasted because multiple team members unknowingly work on the same task.
- Isolated team members feel left out and are minimally committed to the team objective.
- Managers who do not benefit from team success direct team members to work on other tasks.
- Team members can hide poor performance and then blame technology, management, lack of information, or other team members.

The recommendations in subsequent guidelines will help virtual proposal managers overcome these challenges.

ISSUE	ADVANTAGES	CHALLENGES
Flexibility	Rapidly form, execute, and disband teams.	Cumbersome to manage and motivate people over time and distance.
Resources	Assign the best talent available across time, space, and cultures.	Loss of effectiveness due to low individual commitment to team goal. Time, distance, and cultural differences can lead to miscommunication and conflict.
Cost	Reduce by eliminating travel, housing, per diem; and assigning lowest cost resource.	Possible increase due to more complex management, technology, and training.
Response Time	Reduce travel delays and time spent waiting for resources.	Possible increased time for re-work, delays, inconsistencies, conflict, and mistrust due to miscommunication.

Figure 1. Advantages and Challenges of Virtual Proposal Teams. *Virtual teams offer a number of advantages and challenges.*

2

Establish and maintain a high-trust environment.

Researchers overwhelmingly agree that trust is the key prerequisite for an effective team. However, trust develops differently in co-located and virtual teams. Trusting team members exhibit these characteristics:

- Admit weaknesses and mistakes to each other.
- Request help and assist members outside their area of responsibility.
- Accept questions and suggestions openly without defensiveness.
- Give others the benefit of the doubt.
- Risk offering constructive feedback.
- Disclose their agendas and motivations.
- Offer and accept apologies without reservation.
- Look forward to meetings and team interaction.

- Seek to understand others' viewpoints and perspectives.
- Share responsibility for overall project success.
- Avoid dysfunctional behaviors, such as blaming, attacking, rescuing, or playing the victim.

Managers face a number of obstacles to developing trust within a virtual proposal team. Members bring expectations and potential fears from prior virtual experiences. They must learn to trust team management and other members in spite of the risk factors inherent in time, distance, and cultural separation.

In addition, tight deadlines leave little time to build trust. Because team members may be less willing to participate in a high-risk, low-trust situation, managers must mitigate risks and build trust to enable full team participation.

Virtual proposal managers can rapidly build and maintain trust by adapting their communication techniques to convey a clear sense of action, support, and constructive feedback.

Begin by defining the objective, member roles, individual tasks, and expectations. Trust erodes quickly if objectives, roles, tasks, and expectations are blurred, unclear, or fluid.

Balance pre-kickoff strategy and solution development activities. Target 75 percent completion of strategy and solution development pre-kickoff, especially when

submittal deadlines are one week or less. This compromise supports an earlier kickoff and fosters members' input, buy-in, acceptance, and identification with the team. Begin with a face-to-face kickoff meeting, if you can afford the expense and travel time.

Team members that sense clear, decisive, management and member action remain confident the team will manage the uncertainty and risk inherent in preparing winning proposals. Use the communication techniques summarized in figure 2 to establish high levels of trust early and maintain trust as you prepare the proposal.

TECHNIQUES TO BUILD TRUST EARLY	TECHNIQUES TO MAINTAIN TRUST
<p>Encourage non-task, social communication. Foster comments on hobbies, activities, families, etc. and integrate with other exchanges. Set up an online, shared-space where team members can post their pictures, bios, and other social items. However, do not allow social communication to substitute for progress on tasks.</p>	<p>Communicate predictably. Set and maintain all meeting times, balancing the demands on members in different time zones. Explain every change or absence in advance. Avoid irregular, inequitable, and unpredictable communication. During a crisis, maintain near-real-time communication. Maintain a consistent style and tone in all communication.</p>
<p>Communicate optimistically and enthusiastically. Promote team as a virtual family. Use <i>we</i>. Encourage positive comments among members. Discourage negative remarks.</p>	<p>Develop schemes to deal with technical and task uncertainty. Have three or more ways to connect with team members (e-mail addresses, both home and work; phone numbers for work, cell, spouse's cell, team buddy, manager(s), and key co-worker(s); instant messaging; and perhaps, social media links)</p>
<p>Develop schemes to handle task and technology uncertainty. Number and date the messages and meeting notes consecutively so members can place them in context and detect missing items. Confront and promptly handle vague statements, allegations, and complaints. Publicize members' activity and inactivity. Encourage exchanges that clarify and develop consensus.</p>	<p>Encourage proactive action. Reward and praise individual and sub-team commitment and accomplishment. Communicate positively, concisely, and specifically. Avoid weak, vague, or equivocal statements.</p> <p><i>Weak: Complete in 4 or 5 days.</i> <i>Stronger: Submit before 3:30 PM on Thursday.</i></p>
<p>State exactly how you will manage. First impressions are critical. Emphasize performance, not behavior-. State how you will manage missed deadlines. Members tend to respond similarly to how they are initially treated.</p>	<p>Respond promptly, explicitly, and predictably to all messages. Low-trust teams characteristically get little feedback from managers or members.</p>
<p>Clarify roles, procedures, and quality standards. Be unequivocal. Then transition from procedural to task focus.</p>	<p>Assign task leadership based upon skill, ability, interest, and enthusiasm.</p>
<p>Focus on, praise, and reward on-time completion of initial tasks. Say what you mean, and mean what you say. Laud good performance; praise in public.</p>	<p>Use peer pressure constructively. Continue to praise good performance. Note impacts of substandard performance; scold in private; escalate repeated poor performance; eliminate non-performers.</p>

Figure 2. Team Communications Strategies Establish and Maintain High Trust. *Your communication with your virtual proposal team and members' communication among themselves are the only means that you have to develop and maintain the member trust needed to prepare a winning proposal.*

3

See **TEAM SELECTION AND MANAGEMENT** for descriptions of traditional proposal team roles.

Define and assign key virtual team roles clearly.

Roles for virtual proposal teams are subtly different than typical proposal team roles. The same tasks must be completed, but the roles shift. Key virtual proposal teams roles and descriptions follow.

Manager/Facilitator: Encompasses the traditional proposal manager role and often some of the proposal coordinator role. As with the proposal manager role, the primary

responsibility is to prepare a compliant, responsive, winning proposal. Assign others to develop the solution and pricing. The primary tasks are to facilitate team meetings and manage participants.

Participants: As with co-located proposal teams, participants are contributors. Their primary responsibility is to produce a compliant responsive proposal section and/or other assigned, scheduled tasks.

Knowing when to ask Champions for help is difficult, especially with short deadlines. In general, make specific requests for action. Avoid presenting vaguely formulated problems. Take *advice* question to a *coach* or mentor, someone that you can talk to openly and constructively.

Technologist: Similar in many respects to the proposal coordinator role, the technologist sets up virtual meetings and workspaces. The technologist also handles security and access issues, and coaches/trains participants to use the technology correctly. Ideally, the technologist supports multiple proposals in a consistent manner so that participants who contributed to prior virtual proposals can use the same tools and procedures as before, reducing training costs and start-up delays.

Owners: Whether a single person or multiple people, owners sponsor and pay for the proposal. Owners are usually not the sales

lead, but have overall responsibility to win the opportunity.

Board of Champions: The ideal Champion is two or three levels above the participant and not the immediate supervisor. Champions have the authority and big-picture vision to replace participants, free participants from conflicting direct management assignments, and offer additional direct support. Immediate supervisors often have split or conflicting interests in that they must oversee members' regular responsibilities while members are contributing to the proposal. Dual or split assignments exacerbate the problems.

4

Establish clearly defined, discrete tasks.

While this recommendation applies to any team, it is vital for virtual team success. In a face-to-face environment, team members are more likely to ask questions, and managers can more easily view work products. In a virtual environment, participants tend to overstate their progress and misunderstand instructions.

In co-located team environments, proposal managers can establish major tasks and milestones to quickly get the team started, and then prepare inch-stone tasks and completion dates to more precisely track progress.

In a virtual environment, begin with more task granularity. If you do not, team members tend to think that their task assignments are being changed mid-course, and they lose commitment to the project. With virtual teams, inch-stone tasks help you identify late tasks before they threaten your schedule.

See **SCHEDULING**, guideline 6.

Use these questions to determine if your tasks are clearly defined:

- **Is the task sized?** For example, 2 pages, 4 hrs. of engineering time, or limited to work at the Erie facility.
- **Is the due date precise?** For example, 10:00 AM EST, Tuesday, February 4, 20XX.
- **Is the person responsible named? Naming a position or group is seldom sufficient.**
- **Are quality standards defined or referenced?** For example: Sections must have theme statements and all figures must have action captions. Sections must be spell checked before submitting.
- **How will you verify task completion?** Normally you verify when you receive a file, or when something that you can see, hear, or touch is delivered.
- **How will you escalate responsibility if this task deadline is missed?** Disclose the quantified impact on subsequent milestones, and possibly name the person you will escalate responsibility to.

5

Select task-appropriate, easy-to-use technology.

Match technology to task complexity. Small virtual teams can be managed using e-mail, scheduling, and word processing tools. Larger, more complex teams require more sophisticated tools. Advice on tool selection is well beyond the purpose of this *Guide*, and these tools are evolving rapidly.

Virtual teams work in an on-line, collaborative workspace. Participants' work should be open and available to managers to monitor progress. Managers often need to control team members' ability to view and modify files. Typically, team members check out files, modify those files, and then re-save modified files in the shared workspace. While some tools support team

members' simultaneous access to the same file, many proposals are too large for this approach.

The easier the technology is to use, the better. Participants must be comfortable with the technology before they can focus on completing assigned tasks. Give participants hands-on tool training, not just a demonstration of the tool being used by an expert user.

Here are a few suggestions on using virtual team management tools:

- Use familiar technology as much as possible. For example, if you routinely use specific e-mail, scheduling, and net-meeting technology, use the same technology for the proposal.

- Establish 24/7 technical support. When participants in multiple locations and time zones lose access to files and shared workspaces, they begin working off-line and use lost access to justify late deliverables. Integrate live and on-line support. Even when the technologist is on-duty, every team member cannot be helped simultaneously.
- Automatically back up files daily. Time-stamp files in case you need to return to prior versions.
- Be clear and decisive about technology issues. Do not tolerate member resistance on technology and tools. Even if member

suggestions are valid, you lack time for discussion and adaptation. Members perceive indecision as a weakness in proposal management.

- Establish and maintain consistent procedures. Use identical passwords, call numbers, call times, agendas, and forms.
- Consider interoperability issues. Prime contractors, subcontractors, and teaming partners need to be able to work together compatibly while protecting proprietary and limited-access data. Address these issues before they impact your proposal.

6

Over communicate.

One of the surest ways to lose member trust is to communicate infrequently or sporadically. One veteran virtual proposal manager reports that she routinely uses three modes for every message: text-message, voice mail, and e-mail. The greater the urgency, the greater the need to use more communication modes.

- Adapt your communication style to your corporate and team members' local culture, and within reason, to the preferred style of the participant. Some members resent messages that clog their e-mail accounts, especially when sent to both home and work accounts. Members in some cultures object to messages sent to their homes, preferring to distinctly separate work from private life. However, most team members see communication as a sign that the proposal is important, their assigned task is important, and their team leader cares. They will realize that team and organizational needs often outweigh personal preferences.
- Keep your messages short and to the point. Use informative subject lines containing signal words. State the essence of your message in the e-mail subject line.

- Keep voice mail messages under 2 minutes.
- Leave your return phone number at the beginning and end of your message. A good practice is to prompt the listener to prepare to write down your number by saying, "I will repeat my phone number at the end of this message." Improve the callback rate by saying your phone number clearly, slowly, and then repeat your number. Do not assume that the listener will or can use the voicemail playback feature, or that the caller ID will display your number.
- Limit web conferences to 30 minutes and never exceed 50 minutes. If you need more time, take a break and resume or schedule another meeting.
- Consider establishing a secure proposal team blog where participants can post questions and share information. Otherwise, every question is unaddressed until the next meeting, directed through a management chain, or ignored.

7

Distinguish team management, leadership, and member motivation.

Proposals are not managed by group consensus; the proposal manager is in control. However, control is complicated in temporary, task-focused teams when the manager/facilitator is not the direct manager of team members.

To compensate for a tenuous control position, effective virtual proposal managers must lead as well as manage. Managers control, but leaders inspire and motivate. Managers get people to do what the managers want; leaders get people to want what the leaders want.

Management entails clearly defining tasks, quality standards, schedules, and key roles. Managers then assign the best available people

and train members when necessary. Both sponsors and champions must understand team members' roles, responsibilities, and schedules.

Effective virtual proposal managers lead, as noted in guideline 2, by fostering early trust among the group, and by maintaining member trust until tasks are completed. Effective leaders emphasize the common objectives of winning the deal; being successful; contributing to their organization, team, and industry; and serving the customer. Effective leaders also recognize and adapt their communication style to team members' unique interests, motivations, circumstances, and cultures.

8

Establish virtual meeting ground rules.

Virtual meetings present additional challenges. Face-to-face communication integrates visual, vocal, and verbal elements such as body language, gestures, movement, posture, and appearance. Vocal elements are **how words are said, pronounced, and emphasized**. Verbal elements are **composition, word choice and order**.

In teleconference meetings, all visual elements and cues are eliminated. Participants are limited to vocal and verbal elements, which are often degraded by poor transmission quality. Simultaneous comments are difficult to hear in live meetings but are completely lost in teleconferences.

In videoconference meetings, the quality of visual elements is degraded as well. People can step out of camera range or turn the camera off. Video quality is often compromised, especially with lower fidelity web conferencing equipment. Images can be small, jerky, and low-resolution. Some people are uncomfortable seeing themselves on video, which can negatively affect their contributions.

Virtual proposal team managers can partially compensate for these challenges by establishing virtual meeting ground rules similar to those found in figure 3.

Effectively managing virtual proposal teams may be challenging but is well worth the effort when the result is a winning proposal.

PRE-MEETING	DURING MEETING	POST-MEETING
<ul style="list-style-type: none"> • Make attendance mandatory. Anyone not able to attend must appoint a replacement and notify the meeting facilitator. Announce replacements when the meeting begins. • Define in writing all roles and the authority and responsibility of each role. These role definitions can be used from proposal to proposal. Participants represent and make decisions for their groups. Participants cannot go back to their organizations for approval. • Have an agenda for all meetings. Distribute a detailed, written agenda to participants before major meetings, allowing participants reasonable time to prepare for the meeting. Informal meetings can be effective with a verbal agenda. • Ask your technologist to be available for every meeting until you are confident that all participants can enter the meeting and use the chosen meeting tools. If the technology or team is new, test all systems before the meeting. 	<ul style="list-style-type: none"> • Enforce a culture of on-time call-ins, verbal identification of participants and purposes, and announcements of early departures. —Virtual meetings must be as professional as regular meetings. Insist that participants focus on the meeting rather than completing other work, checking and answering e-mail, or babysitting. • Begin by summarizing the agenda items, meeting ground rules, and schedule. Seek acceptance, and then keep your word. • Appoint a note-taker to keep meeting minutes. Facilitators cannot effectively facilitate and take notes. • Appoint a timekeeper. The timekeeper can be the note-taker or any participant except the facilitator. • Poll participants for acceptance after each agenda item. Obtain closure and summarize each agenda item before going to the next item, even if your decision is to postpone discussion or to take the discussion to a different group. • When assigning tasks, ask the assignee to restate their understanding and acceptance of the tasks. —Note that the assignee is responsible for completing the task, either by themselves or through others. Emphasize that task owners need not be the expert or the doer, just that they must get the task done. • Remain positive, proactive, and precise. Commend good performance. Note marginal performance by addressing the team rather than blaming individuals. For example, if pricing input is late, do not say: Why is your pricing late? When will you submit the pricing? Instead, say: Is the pricing team having any particular difficulty developing the price? Is there anything that I can do to help your team complete the pricing? —Note that you will address repeated poor performance off-line. Team members should not get the impression that poor performance is tolerated. • Close the meeting on time, noting that you did so. If you can close early, note it and point out that participants have x minutes of additional time. • Close each meeting by reviewing agreements, tasks, completion times, and responsible individuals. 	<ul style="list-style-type: none"> • Distribute minutes immediately after the meeting, documenting agreements, tasks, completion times, and responsible individuals. • Immediately address poor performance off-line with the assignee. If you must escalate to the relevant Board Champion, tell them what you are doing, and then do it. Team members learn about empty threats. When deadlines are short, you often cannot afford second chances, and never third chances.

Figure 3. Potential Virtual Meeting Ground Rules. Adapt these virtual meeting ground rules to your organization, management authority, situation, and personnel. Ground rules that are overbearing in one situation are lax in another.

9

See **REVIEWS; DECISION GATE REVIEWS, and COLOR TEAM REVIEWS, Capture Guide.**

Establish a rigorous review schedule.

Co-located and virtual proposal teams require the same Decision Gate and color team reviews for proposals of similar type, size, and risk. Blue, Black, Pink, Red, Gold, and Lessons-Learned reviews are described in **COLOR TEAM REVIEWS, Capture Guide.**

However, you need to adopt a different approach to reviewing the daily work progress of team members in a virtual environment. Figure 4 compares daily review techniques for co-located and virtual proposal teams.

CO-LOCATED TEAM PROGRESS REVIEW	VIRTUAL TEAM PROGRESS REVIEW
Daily standup meeting	Daily conference call
Review posted drafts on proposal room walls	Open and review individual work files in shared work space
Check sign-in and sign-out logs	Check when files were checked out and in (resaved). Many systems offer automatic notification
Managing by wandering about	Instant message logs, discussion threads in collaboration tool or e-mail
Schedule one-on-one reviews	Schedule one-on-one telephone calls

Figure 4. Reviewing Daily Team Progress. *Co-located and virtual teams managers must use different techniques to monitor team progress. These techniques are increasingly used in blended team management environments.*

