

Revised Virtual Collaboration Protocol

19th January 2010

Protocol Outline

Identify Process Coordinator and Team Members

Pre-Meeting: Introduce Process Coordinator to Team and Communicate “Case” for Team Members to Establish Core Problem Dimensions

First Second Life Meeting: Introductions, Agree on Team Roles, Agree on Process Guidelines and Define/Rate Core Problem Dimensions

Pre-Meeting: Develop Awareness and Bases of Expertise within the Team for each Core Problem Dimension

Second Second Life Meeting: Agree on Task Roles, Discussion Norms and Solution Development Process for each Core Problem Dimension

Pre-Meeting: Produce Initial Individual Solution Templates, Provide Comments On All Individual Solution Templates and Update Individual Solution Templates with Feedback

Third Second Life Meeting: Present Interim Solutions, Identify Gaps and Begin Compiling Full Plan Document

Post Initial Integrated Plan Document and Complete

Identify Process Coordinator and Team Members

While the virtual teams will not have a traditional team leader it will be important that they have a process coordinator to help initiate agreement on the problem domain and introduce structure to the overall problem resolution process. This person will fill a process role and does not necessarily have to have significant subject matter expertise (though ideally they would have some awareness of multiple components of the problem space to be able to play an integrative role across experts).

High level characteristics of a Process Coordinator will ideally include:

- Some level of subject matter expertise in one or more dimensions of the problem space.
- Facilitation skills for problem framing and coordination of expertise.
- High level project management capabilities to initiate project roles and establish timeline.
- Technical expertise with relevant collaborative applications

Expectations of this role are the following:

- Determine/communicate date and time for all Second Life meetings.
- Communicate “Case”¹ to team members as well as distribute individual problem map templates and instructions/due date for completion.
- Coordinate collection of individual problem maps from team members and integrate into one overall problem map for the first Second Life meeting.
- Help establish agreement on discussion norms, three team roles (Gatekeeper, Case Planner and Integrator) and solution process in the second Second Life meeting.
- Contribute as an expert in his/her domain.

Expectations that this role is NOT supposed to fulfill:

- Be an expert in all or even most dimensions of the problem domain.
- Be a final decision-maker.
- Be expected to individually handle conflict resolution.
- Be a leader in the traditional/hierarchical sense of the word.

¹ The word Case is used throughout this protocol to reference the problem scenario that the team must solve.

Pre-Meeting: Introduce Process Coordinator to Team and Communicate Case for Team Members to Establish Core Problem Dimensions

The first steps for the process coordinator will be to:

- 1) Introduce themselves and the role they will be playing to the team members;
- 2) Communicate the Case to the team members;
- 3) Introduce the individual problem map and
- 4) Coordinate a time for the first Second Life meeting.

In introducing themselves the process coordinators should provide a brief background (hopefully both professional experiences and some things about them personally such as hobbies, interests, alma mater or other information). Then they should introduce the process coordinator role they will be playing using the expectations set out above so that team members come into the first meeting viewing the process coordinator as a facilitator and not an expert or team leader in the traditional sense of the word.

In introducing the individual problem maps the process coordinator should use some variation of the text below to establish the importance of getting holistic agreement on the key problem dimensions presented in the Case:

Complexity of the problem we face in the Case demands effective collaboration amongst the considerable expertise on this team. Yet quite often our expertise – the thing that makes us valuable to a given problem domain in the first place – can blind us to the importance of other interlocking components of a problem. Particularly early on it is critical to have collective agreement on the key dimensions of a problem prior to moving into problem solving. Given this, as you read the case establishing the problem to be solved I would like each of you to complete the attached individual problem map template to identify and rate core problem dimensions from your perspective.

This step is designed to ensure that this team of experts is focused on the problem holistically before jumping into solutions. As process coordinator, I will collect each of your individual maps and make my best effort to integrate each team member's thinking into an integrated team map. My purpose here will be to create a single map that we can use as the basis of our first discussion in Second Life. At that time I will walk through each problem dimension identified and ask the contributor to provide further clarification or points that I did not capture correctly so that we can have a complete understanding of the problem space.

Please take some time in the coming 24 hours to read the case and complete the below template with the following column definitions in mind:

- **Problem dimension:** This is a short text description of each issue in the Case that a given team member documents as being important to address.
- **Rationale:** This is a short text description of why this component matters and must be addressed as a part of this effort.
- **Ranking:** Team members should complete the problem dimension/rationale statements for the entire case first. Once finished, the team members should then go back and prioritize each identified issue as hi, medium or low. Ideally I would like to get roughly equal distribution of the three responses but would not require this.

When returning your problem map to me, please indicate as many times as possible that you could be available for our first virtual meeting in Second Life. This will be very important for us to gain agreement on the problem space and so I ask each team member to quickly provide me with as many 90 minute slots of time as they can immediately. I will then do all I can to find the best time for us all to meet.

First Second Life Meeting: Introductions, Agree on Team Roles, Agree on Process Guidelines and Define/Rate Core Problem Dimensions

The process coordinator will welcome everyone and thank them for their time. They will then introduce themselves and ask each team member to spend a minute or so on their professional background and then one or two points about themselves personally (e.g., interests, hobbies, alma mater, etc.).

From this point, the Process Coordinator will indicate that the first purpose of this Second Life meeting will be to agree on and assign three roles that will help to advance the plan on time as well as some discussion norms to ensure that synchronous and asynchronous dialogue remains constructive throughout this important phase. S/he will indicate: Our first step will be to agree on and assign three important roles to help us ensure a good team process going forward. Let me review the roles I think important (Note: The table below would be posted to the Second Life collaborative space and updated in real time) and please let me know if you think we should add to either the list of roles or expectations of each role. I would like one person to volunteer for each process role going forward. The roles I think are important are:

Role	Expectations	Team Member
Process Coordinator	To help frame the problem dimensions and establish team processes for solution development.	Me
Case Planner	Document and remind people of deliverables. Help us to all keep on plan for delivery of our parts of the solution.	
Gatekeeper	Make sure that everyone gets a chance to contribute and that the team is not dominated by one or two people. Help keep us on a productive timeline in Second Life meetings.	
Integrator	Ensuring that task deliverables are integrated and consistent, regardless of how the tasks are performed.	

Next the process coordinator will indicate that the remainder of this first meeting is to gain as holistic an agreement as possible on the problem space and key problem dimensions. S/he will indicate that the first step will be to review and gain agreement on the problem dimensions based on his/her best effort in integrating the individual problem maps. Before beginning the process

coordinator should emphasize that this is just a starting point as s/he attempted to capture people's thoughts and that the hope is that this will be built out and added to in the next hour or two.

The process coordinator will then lay out the overall timeline and some suggested milestones for the team to meet in delivering its plan. In doing this s/he should reference process norms that s/he hopes the group will adhere to. These norms can be posted in the collaborative space of Second Life (please see an initial table of suggested norms below for use as a starting point). At the appropriate point in the meeting the process coordinator should take team members to the place in Second Life where the norms are posted (a collaborative space that will also be used to post other team work products) and describe each of the process norms that s/he feels are important to adhere to as the team delivers its work product. S/he should then ask if people are comfortable with these and if not to please suggest changes or additions. As any input comes in the process coordinator can adapt the norms in real time. This process will help to get early agreement on high level norms while also demonstrating functionality that the team members will need to use in the final stages of crafting and editing their plan.

The process coordinator will then present his/her understanding of each problem dimension based on the consolidated problem map table below (which will also be posted in the same area of Second Life). S/he will represent the problem dimension and then ask the team member contributing that problem dimension to further clarify their thinking on the issue and its implications and importance. As this person(s) adds or clarifies points the process coordinator will capture this live in the collaborative workspace in Second Life. When the contributing party(s) is done adding any additional ideas or clarifications the process coordinator will ask if others have anything to add and will at this point emphasize the importance of all people weighing in with ideas to capitalize on the expertise on the team. When no more thoughts are added to a problem dimension the process coordinator will move on to the next one and repeat this process until the list is complete.

When complete, the process coordinator will engage in a voting process of high, medium and low. This process will help to quickly gain agreement on the prioritization of problem dimensions and so facilitate development of the initial timeline.

After the Second Life meeting the team coordinator will organize the results, categorize the issues from high to low in terms of priority and post to the team space. S/he will then notify all team members that they should make any adjustments to the overall problem map in the coming 24 hours.

Suggested Opening List of Process Norms

Attendance – come to meetings prepared and on time. We have a lot to accomplish in an extremely short time window and so the three virtual meetings we hold will be critical to our overall success.

Individual Work – complete individual work between meetings with care and within the agreed upon timeframe.

Discussion - no untouchable topics, all opinions are invited, expressed and considered on merit.

Clear Objectives - people understand and commit to their tasks and responsibilities when working outside of the group.

Disagree in the Group – no one off or sidebar discussions after the meeting about decisions or other group members that will begin to create factions.

Constructive Confrontation – focus discussion on ideas and do not allow language or text in virtual media to focus criticism on the contributor of idea. Be tough on the ideas but not the contributor. Keep conflict about the work at hand (task conflict) rather than about a person (affective conflict).

Encouraging -- some members need support to help them effectively get their ideas out, or to continue trying to communicate if their first ideas do not go well.

Compromising -- show flexibility and willingness to change in the face of new information.

Appreciation – make sure that quality contributions are acknowledged.

Connect – make time to review team-mate's profiles as they are completed and see where commonalities might exist. This is an incredibly unique group that is coming together and I hope you will capitalize on the opportunity by building connections that go beyond this effort.

Pre-Meeting: Develop Awareness and Bases of Expertise within the Team on Problem Dimensions

A key role for the process coordinator at this stage of the team's development is to help rapidly develop an awareness of expertise within the team as well as competence-based trust in a given team-mates claimed area of expertise. This is a critical determinant of high performing teams that traditionally is developed over time and via many formal and informal interactions with team members as a project unfolds. The coordinator does not have this luxury and so needs to establish this as rapidly as possible with structured protocols.

This will be accomplished by each team member completing the below Individual Team Member Experience Matrix. The Individual Team Member Experience Matrix will be posted on the collaborative portion of Second Life for other team members to view and will also be the basis of a summary document that the process coordinator will use to organize task assignments in the next Second Life meeting. The process coordinator will prepare an Individual Team Member Experience Matrix for each team member by consolidating the problem dimension/rationale components of the Problem Map into column 1. S/he will then post this matrix and request each team member to complete their own experience matrix within 24 hours. The specific dimensions to flesh out include:

- **Problem dimension/rationale:** This is a short text description of the team's agreed on definition and rationale for each problem dimension.
- **Team member skills/knowledge:** This is a short text description of any specific skills, knowledge or experience that a given team member could bring in helping to address the given problem dimension.
- **Basis of knowledge:** This is a short text description of the basis of claimed skills, knowledge or expertise. Ideally this description should be based on experience and credentials that create legitimacy in the eyes of the specific team members staffed to this effort. This is a first step in building competence-based trust and so important for collaborations going forward.
- **Professional experience:** This is a short text description of other relevant professional experience the team member brings.
- **Personal background:** This is a short text description of personal background (e.g., alma mater, home town, family, hobbies, interests, etc.). The description can take many forms, but is important to include for members to connect on off-task levels to build benevolence-based trust as well as be willing to reach out to team-mates with a question.
- **Photo:** This is a photo that the team member will upload into their profile.

The process coordinator will then consolidate the Individual Team Member Experience Matrices into the integrated team experience matrix and organize the second Second Life meeting to define accountabilities and process for solution development.

Individual Team Member Experience Matrix

Name: _____ **Telephone:** _____

Problem Dimension/Rationale	Team Member Skills/Knowledge	Basis of Knowledge
Dimension 1.... Reason dimension 1 is important to address....	AA and BB	I worked for five years in the ABC office directing.....
Dimension 2.... Reason dimension 2 is important to address....	None	None
Dimension 3.... Reason dimension 3 is important to address....	CC	My current role requires me to....

Professional Experience: _____

Personal Background/Interests: _____

Second Second Life Meeting: Agree on Task Roles, Discussion Norms and Solution Development Process for each Core Problem Dimension

The process coordinator will open the second Second Life meeting by indicating that at this point it is time to move to solution development. As such, the first purpose of the meeting will be to review a common template we will all use to develop solutions that can be easily integrated into an overall plan. With this template in mind, we will review the integrated experience matrix to make task assignments as well as identify points where we have insufficient expertise on the team and so need to reach out to our networks to supplement this expertise.

As we move to more of a substantive focus on solutions and plan development I want to agree to a set of discussion guidelines to keep our dialogue as productive as possible. This is particularly important in a virtual context as we lose a great deal of visual and verbal cues that we often use to understand people in face to face meetings. I am sure everyone has had the experience of writing something in email that did not come across as intended and I just want to do all we can to avoid a problem like this causing destructive patterns within the team as we each comment and build on others' ideas. The specific norms I would like to suggest are (Note: Again, I would anticipate the below being posted in the collaborative space):

- **Appreciate first.** Take the time to first acknowledge the strengths of each person's ideas so that the person's work is appreciated and the solid parts of each plan are retained as we move forward.
- **Separate the critique of an idea from the person.** For example, rather than saying: That is a bad idea. Try phrasing something like: Given where we are trying to go, here is an alternative to consider.
- **In offering critiques always make your reasoning explicit.** This helps people to understand the context of your comments. It also shows your own willingness to expose your thinking and take a risk with ideas.
- **Keep on task and building to a solution as threads develop.** We all have a lot to review and accomplish with little time. Work hard to make sure that your comments don't wander into areas of personal interest but help to move us to the best solution.
- **Use backchannel media for clarification or early stage brainstorming** (e.g., email or phone to connect directly with an expert).
- **Others (TBD by group)**

Next, I would like to introduce the problem dimension solution template. This is a template designed to keep our work product roughly consistent as we complete our individual assignments. I will ask each team member to do two things leading up to the next Second Life meeting: 1) To please complete the solution and expertise portion of your assigned template on time and with the agreed to level of detail (Note: I would require this to be done 48 hours prior to the next Second Life meeting so that people have a 48 hour window to review and comment on

other people's solutions); 2) To please make the time to review and provide helpful comments on all of your team-mate's solutions per the format below.

Finally, let us walk through the integrated team experience matrix. At this point I would like [Person 1] in her/his role as case planner to use the integrated team experience/accountability matrix to document each next step. For each agreed on action I would ask that [Person 1] step into the discussion at that point and make sure we have agreement on next steps and the due date for that team member's commitment. The integrated team experience/accountability matrix will be posted in the Second Life collaborative space and can/should be updated in the notes field as each team member evolves their solution.

Similarly, I would ask that [Person 2] in his/her role as gatekeeper would begin to monitor contributions so that we ensure we are getting the greatest leverage from the team overall. While this is a more informal role, I would ask that s/he interject now and again to make sure we are hearing from all team members. In addition, I would ask him/her to send an email to the team members after this meeting to get any feedback on our process so far and things we should do differently going forward. S/he will summarize any comments received and post to the team space in the next 24 hours.

Problem Dimension Solution Template

Problem Dimension: _____

Solution: _____

Specific Actions for Solution:

Additional Experts/Resources:

Team Member Acknowledgement/Contributions

Team Member	Acknowledgements/Contributions
Jerica	I think the clear strengths of this plan are ... A couple of ideas that hit me in reading it which might make it even better include ...
Etc.	

Integrated Team Experience/Accountability Matrix

Problem Dimension/Rationale	Team Members With Skills/Knowledge (Highlighted Team Member Accountable For Task)	Solution/Delivery Date
Dimension 1.... Reason dimension 1 is important to address....	Bob, Paul and Sally	Bob, Paul and Sally to meet separately and document Xxxx. August 15 th .
Dimension 2.... Reason dimension 2 is important to address....	None Samantha accountable for follow up.	Samantha to reach out to experts and incorporate Xxxx. August 8 th .
Dimension 3.... Reason dimension 3 is important to address....	Jerica	Jerica will obtain the files on the last XXX and incorporate. August 8 th .

Pre-Meeting: Produce Initial Individual Solution Templates, Provide Comments on All Individual Solution Templates and Update Individual Solution Templates with Feedback

This phase of the effort will largely entail individual and sub-group work based on the assignments and delivery dates established in the integrated team experience/accountability matrix. The length of this phase of work will be dictated by the Case demands and team member availability. At this point the process coordinator would play less of an active role and ask that the Case Planner and the Integrator step forward to help provide structure and guidance.

Specifically, the Case Planner should be in appropriate communication with each sub-group to advise the full team on status and next steps. Some kind of periodic update to the team members should be made by the Case Planner (along with concurrent updates to the integrated team experience/accountability matrix) to ensure that there is some degree of social pressure for everyone to contribute on time and with the requisite level of quality. If the time window on resolution of the case is only a week then these updates should probably occur every 24 hours to keep people on target. If the Case resolution period is longer the intervals might be further apart. But the principal point would be to try and keep people on track timeline-wise and create a little social pressure for everyone to contribute as promised.

Additionally, once each sub-group has posted their initial plan, the Integrator should begin playing his or her role in helping to provide guidance to each sub-group on how to fine tune each part of the report. Specific attention should be paid to two important dimensions as the Integrator provides feedback to each individual or sub-group:

1. Points of specific solutions that are exemplars and so pieces of work that other team members should look to in crafting their own solutions. The intent of this kind of feedback would be to raise the quality of each solution as well as the consistency of the overall plan when integrating different member's contributions.
2. Points across individual solutions where integration is required to produce the desired impact. These integration points should be discussed and resolved if possible ahead of the final Second Life meeting but if not at least identified as something to focus on in that more structured format.

Then build in one final phase for all of the sub teams to update their final plans (if time is available) or the integration process might also begin during the comment period.

Third Second Life Meeting: Present Interim Solutions, Identify Gaps and Begin Compiling Full Plan Document

The specifics of this meeting are left to the discretion of the team members to either continue to refine the solution template information across the problem dimensions, identify the final integrated plan document and needs or begin the integration process itself for the final document. An open question is whether a single document is needed or multiple documents are needed according to which participating organization it is for.

Post Initial Integrated Plan Document and Complete

Document to then be posted and a timeframe and expectations sent for team members to comment and edit the plan.