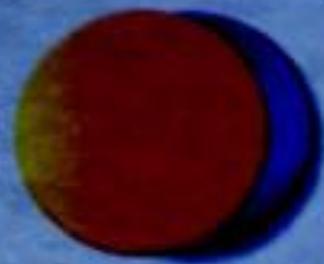


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Liberating Potential in Remote and Virtual Teams

A Brief Guide for Leaders and Managers

Written by
David Willcock
Director
Liberating Potential Ltd.

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Purpose

The current pandemic has suddenly forced many previously co-located people to work remotely and virtually most of the time. My hope is that the information in this guide will help leaders and managers, at least in part, respond to the challenge during the crisis.

The purpose of this brief guide is to help busy leaders and managers in organisations focus on priority people development areas and actions needed to improve the performance and well-being of remote and virtual teams. It can serve as a useful introduction for leaders new to remote/virtual teams and a handy checklist and reminder for more experienced leaders.

This guide draws on over 25 years of the author's experience working with different teams as well as relevant research. It uses Will Schutz's "FIRO®" theory as an organising framework¹.



Introduction

The subject of remote and virtual team working gained in ascendancy during the 1990's, driven by economic globalisation and the rapid growth in the use of information technology in business. Not only could people deliver team results from separate locations, they could do it from different countries, over time as well as space. This presented business with a huge opportunity for the management and leadership of talent on a global scale. It expanded the talent pool enormously and provided great flexibility in how people can be involved in different projects.

This remains the case today - as does the potential threat to the exciting business opportunities that globalisation and new technology provide. It is the confusion over how these teams are different from traditional teams and how they need to be led and managed – confusion which is particularly prevalent amongst people who have developed their careers in a more traditional team environment.

The key differentiating characteristics are:

- ✚ Team members, or groups of them, are separated by location. In global teams these distances add other dimensions such as time, language and cultural differences.
- ✚ Team members make more use of technology both for communication and collaboration.

This distance and use of technology is the source of confusion for leaders, managers and team members alike about "how to make it work". Certainly they introduce a complexity that is not present in local, co-located teams². The added complexity does require certain aspects of leadership and management to be emphasised – more will be said of that later. The danger is that these differences hide the important fundamentals regarding the leadership and management of people.

The labels "remote" and "virtual" and the fact that they are treated as subjects in their own right probably add to the confusion. New terminology has flourished in books and articles on the subject. Some provide new words for the stages of team development in line with their own research³. One

¹ Will Schutz (1979). FIRO® is a registered trade-mark of CPP, Inc. (www.cpp.com)

² Having said that, the author has worked with co-located teams that prefer to send e-mail messages to each other rather than speak. You don't have to be distant to be virtual!

³ For example, Johansen et al (1991), have seven stages of team building: orientation, trust building, goal/role clarification, commitment, implementation, high performance and renewal. Studies by the University of Alberta in Canada suggest four stages: initiation, exploration, integration and closure.

book attempts to rewrite the rules around accepted theories of team development, claiming that they do not apply in virtual teams⁴. The importance of technology for communication means that “virtual” can be synonymous with “technology” for some people; the solution to “how to make it work” therefore being seen as a technical one⁵. The risk is the promotion of machines over people.

Despite these differences the organisation development challenge remains the same - getting the right “fit” between the strategy, the people, the technology and the process⁶. Technology is a necessary communication tool. Depending on the task, it is possible to work “virtually” with no more than telephone and e-mail. In many cases, such as collaboration over product design, more sophisticated technology is required. Examples include intranets, internets and video conferencing. Leaders and managers need to be aware of the possibilities and ensure that team members have appropriate resources. It is not however their primary contribution.

Leaders and managers need to focus on the human element in virtual teams. Remote and virtual working tends to focus people more on “task” achievement at an early stage. As such it can seem more efficient as people get on with the work without the usual interpersonal and group dynamics (presumably this is why new models of team development have been introduced). For the task-focused manager this could be a very comfortable situation. However, a lot of motivation, insight and creativity can be missed if the human factor is not considered. Remote and virtual teams are still made up of people engaged in a common task, and from this point of view the same core principles of team leadership, management and development apply. The new virtual environment demands a mindset that recognises the continuing human needs for contact and meaningful relationships and an ability to utilise all available medium to meet them⁷. If teams get stuck and do not go through development stages in their relationships, they will be prevented from realising their full potential.⁸



The Firo® Framework

A useful model for looking at the requirements for remote and virtual teams is Will Schutz’s “FIRO®” framework, standing for Fundamental Interpersonal Relations Orientation. Schutz identified three desires in relationships – inclusion, control and openness⁹. Each of these desires is negotiated at different stages of a relationship. Early in a relationship, personal inclusion issues are paramount. As the relationship develops people need to sort out control issues. Later in the relationship the degree of openness between people is managed. The framework is useful because it is so fundamental – all people have the same desires to a greater or lesser extent at different stages of interpersonal and group relationships. It also relates well to the ever reliable “Stages of Group Development” by B.W.Tuckman – Forming, Storming, Norming, Performing and Ending¹⁰. Here I describe the implications of the framework for remote and virtual teams:

⁴ Duarte and Snyder (2001). The majority of this book is excellent.

⁵ Whilst working with the senior management team of two merged IT organisations in Europe, the author asked them how the integration of people at the two office sites in separate countries was progressing. They replied that it was complete. They now had the telephone system set up so that calls could be taken from customers in both locations. The behaviour of the management team showed that they were not at all integrated. At another team event a senior manager was asked about his views on virtual teams and “how to make it work”. He said only that getting the right technology was important.

⁶ Richard Tanner Pascale (1990)

⁷ A point well developed by Bridget Farrands (1997) and given a “stone age” perspective by Lipnack and Stamp (2000)

⁸ A related point – this guide was written in times of change, not crisis, but how you lead in the current crisis will be influenced by how you led previously and therefore how engaged, motivated and willing people are.

⁹ Will Schutz originally spoke of a theory of interpersonal ‘needs’ but later revised this to desires or ‘wants’ in the new FIRO®Element tools as this supported his philosophy that people have choice and are limitless (Ethan Schutz, 2009)

¹⁰ B.W.Tuckman (1965, 1977)

Inclusion

This links with the “Formation” stage of Tuckman’s stages of group development. Inclusion is about that fundamental human desire for belonging and to feel part of something worthwhile – a particularly important issue for leaders wanting teams that are engaged and motivated. In a remote and virtual team context, it might seem more difficult to create a sense of togetherness, but it is no less important. Peoples’ different preferences for inclusion need to be resolved to some extent so they get to know each other, generalities and stereotypes are overcome and trust and commitment is developed. Early on in relationships individual behaviour can be driven by a desire to be accepted by others, to avoid controversy or conflict or to protect their self-interest or identity. Team members are gathering information and impressions about each other and making comparisons and judgements based on their own frame of reference. To grow from this stage to the next requires group members to be more open with each other about their thought and feelings and to risk the surfacing of differences. Once individuals’ inclusion issues are at least temporarily resolved and people feel sufficiently safe in the environment, the team can move on to the next stage.

Control

This links with the “Storming” and “Norming” stages of Tuckman’s stages. Control concerns the issues of personal power, influence and authority and how the decision-making processes work. Team members will have differing desires for control, but will want to feel involved and able to influence things that are relevant to their work and their role in the team. As the group members engage around the organisation of the task, differences inevitably surface. This may relate to the work of the group itself, to roles and responsibilities, what the work ‘rules’ are, or the leadership of the group. From a team point of view this needs to be managed to ensure constructive confrontation and mutual collaboration rather than destructive confrontation and individual agendas. A safe emotional climate needs to be maintained to enable people to contribute to the discussion. It is important to successfully navigate this phase to prevent team members becoming isolated, annoyed or generally losing interest in the team. In a remote and virtual team context there is a heightened risk of withdrawal and avoidance – just getting on with the task. One of the most important behaviours required during this period is the ability to listen. Again, once individuals’ control issues are at least temporarily resolved the team can move on to the next stage.

Openness

This links with the “Norming” and “Performing” stage of Tuckman’s model. It concerns the extent to which people talk about their feelings and values or keep them hidden and is about finding the right amount of openness to support good working relationships and high team performance. Openness is a difficult value to develop in organisations. What’s appropriate for one person will not be for another. One of the problems is that in organisations people often don’t navigate the control phase of the relationship successfully and so compromise on the level of openness that is tolerated. This can lead to an unhealthy norm developing. This can either be a ‘comfortable’ norm where on the surface people relate well but tend to be polite, hide real differences and avoid difficult challenge, or a more obvious level of dissatisfaction. This kind of team climate can impact on personal well being and performance as well as relationships with other teams across the organisation. From a team point of view there is a need to foster enough openness to ensure sufficient challenge as well as support to achieve the team goals.



Key Requirements for Remote/Virtual Teams

The following is intended as a “checklist” of practices to support the resolution of issues around inclusion, control and openness in remote/virtual teams. No priority is intended by the order of the items.

Inclusion

People get to know each other. Some of the latest corporate intranet technology can facilitate global connections. Google for example has more than 100000 special interest groups on their intranet and Ogilvy and Mather have hundreds of communities of interest. These online sites also provide common platforms for collaboration on projects. This helps to develop a sense of belonging as part of the company culture, as well as helping virtual team members to get to know each other quickly¹¹. Research by London Business School and the Concours Institute suggests that virtual teams are likely to be more successful if they include a few people who already know each other¹². See also under ‘Openness’ below the importance of facilitating virtual team relationships.

Information is available to all. Everyone needs to be able to participate and learn. This means ensuring equal access to information for team members, for example through corporate intranets and newsletters.

There is regular and mutual communication. Appropriate means need to be found to distribute necessary information to team members in remote locations. It is also important that communication is mutual in the sense that “dialogue” still takes place even over electronic medium. People who are co-located also need to work at their communication to avoid duplication, e.g. the same message being sent out twice to other members of the remote team. Otherwise communication can slip into unilateral messages with no response and no learning.

The team has a common purpose. People need to feel that what they are involved in is meaningful and significant – a reason to get up in the morning other than to earn money. This needs to be established at the right level to support inclusion in the wider team. The desire to belong is strong and the development of a strong local identity can lead to barriers in the wider team.

There is clarity about individual contributions. People will feel more included if they are clear about the contribution they are making – particularly a significant and meaningful contribution. Research has shown that in remote/virtual teams this needs to be achieved early on in the team’s development to avoid confusion and a possible break down in communication¹³.

Induction takes place. Induction is the primary “formal” way an organisation deals with inclusion issues. New entrants must have some form of induction to bring them into the team as well as the wider organisation. Helping people develop key working relationships is an important part of this process.

Cultural training takes place. Multicultural teams are not new, but globalisation increases language and culture differences that can impact on performance. Ensuring that team members are aware of their own as well as others cultural differences is an important condition for successful inclusion.

Visibility is maintained. There needs to be news about people in remote locations, whether personal or task, in order to maintain inclusion. This can be achieved for example through virtual meetings, briefings, newsletters and corporate intranets referred to earlier.

¹¹ Swift 2011 and Gratton 2007

¹² Gratton 2007, Gratton and Erickson 2007

¹³ Francis Lau et al (1999); Harvard Business Review, May – June 1998; Gratton and Erickson 2007

Control

The right people are recruited in the first place. Remote/virtual teams rely on a lot more self-control and determination alongside the need to collaborate with others. Getting the right people to work in this environment is a key to success. Recruitment processes need to be rigorous enough to identify the right people – one bad apple can quickly spoil the bunch, whether through poor performance or just by taking up a lot of precious time.

The team has a shared vision, values and goals. Direct control is no longer feasible or desirable most of the time so a “sense of control” needs to be developed through common ambition, values/norms and goals. Norms can be down to the level of what is expected in terms of communication, such as 24-hour response to e-mails.

Self-organisation and shared leadership is supported. People need to be supported to organise themselves more rather than rely on traditional hierarchy to get things done. This has implications for leadership style and the resources available to people.

Trust is actively developed and maintained. Charles Handy considers trust to be the biggest issue in virtual teams/organisations because you cannot see people day to day¹⁴. Trust needs to be developed quickly and reinforced through consistent action and delivery. Trust requires people to know each other personally, which can be achieved through virtual meetings and other means. The nature of initial communications is also important (see under “Openness” below). It also requires a good understanding of what the deliverables are and what people’s expectations of each other are. Work on values, group norms and guidelines can help, but it relies heavily on what people do in practice - do they respond when I have a query or not? Is the right quality of work delivered to agreed timescales?

Appropriate training and development is available at the right time. People need to be supported with their ongoing learning if they are to manage themselves more. In this environment the ability of employees to “draw down” appropriate learning and development at a time that suits them is preferable to the organisation “pushing” training programmes. Online learning is one example of how this can be facilitated. Training in conflict handling and dialogue skills can help in this stage of relationship development.

Establish key core processes with clear responsibilities. Clarity of process and responsibilities at each stage for the core tasks of the team will result in increased efficiency and better relationships. This includes decision-making processes which are transparent. Decisions being taken elsewhere in the organisation away from the work can be a source of frustration. When decisions must be taken that don’t meet team expectations then it is important to provide feedback so that people know they have been listened to¹⁵.

Make specialist staff client orientated. Professions have in the past suffered from focusing on their own agenda too much. Professionals need to be focused on deliverables and how their specialist contribution supports the business and the customer.

Openness

There is high touch alongside high tech. Research by the University of Alberta into virtual team working studied the operation of six virtual teams split between Canada and the USA¹⁶. They were

¹⁴ Charles Handy, 1996

¹⁵ For further information see my blog on people engagement: <http://bit.ly/2GIaPTC>

¹⁶ Francis Lau et al, 1999.

truly virtual in that they only communicated using technology and telephone. They divided the teams into three categories: high performing, middle performing and low performing. Only one team was deemed to be high performing, two middle and three low. A key conclusion was that the high performing team was able to somehow make a personal and social connection through their communication, e.g. through swapping stories and use of humour. Communication in the other teams was characterised by unilateral messages, slow or no response and separate remote working rather than on-line collaboration. They recommended that leaders ensure their teams learn how to develop social connections using technology in this way¹⁷.

Another study by the University of Texas and INSEAD into 29 virtual teams supports the idea that initial electronic communications should be a series of social messages – personal introductions and backgrounds – before focusing on the work at hand¹⁸. First impressions are critical according to this study, and one distrustful message at the outset can have a big impact on team performance over the long-term¹⁹.

Team leaders need to proactively facilitate virtual team relationships, and if necessary, get help. People in remote/virtual teams may not see each other for long periods of time. It is therefore important that task items are not the only thing on the agenda when the virtual team gets together. Work on relationships can include informal “catch up” discussions and more in-depth work on team development. There are real dangers in short circuiting this relationship building and development to save time and costs.

There is good feedback and listening. Problems need to be nipped in the bud rather than allowed to fester. Also, praise and thanks need to be given in good time. There needs to be opportunity and/or a mechanism to surface both positives and negatives in the team until everyone is confident enough to do it for themselves. Guidelines in the areas of decision-making, conflict handling and methods of working can help.

Regular communication in sufficient detail. To develop and maintain a remote/virtual community requires effort from everyone to both communicate and to respond with as much relevant information as possible. Having a team “dialogue” on-line and by other means is one indicator of team integration and collaboration.

People develop their self-awareness and interpersonal skills. Personal development can help team members become more aware of their own patterns of interaction and develop a broader range of behaviours in the remote/virtual team environment. People need enough confidence in themselves to be appropriately open with others. Remote coaching can help with this.



¹⁷ A key insight of the University of Alberta studies is how they use the work of Carl Couch to categorise electronic communication (Information Technologies and Social Orders, New York, 1996). *Unidirectional* communication refers to the communication pattern where members at one physical location are sending messages but members on the other side are not responding. *Bi-directional* conversation is said to occur when members from both sides are sending messages, but not actually responding to messages from the other side in a substantive and cooperative manner. In a sense, they are speaking *past*, or in Couch's terms, *with respect* to each other, since the actors are not sharing affect or co-orientation. *Mutual communication* develops with growth of shared co-orientation. Members on both sides start to speak *with each other*, responding to each other's messages, *mutually* sharing common experiences, and planning/acting not only as per individual or local interests but by taking the priorities, constraints, and interests of team-members in other locations.

¹⁸ Harvard Business Review, May-June 1998.

¹⁹ Whilst doing a needs analysis with the members of one team, the author was handed a long e-mail sent the previous week by the team leader. It was an instruction about standards and was quite critical of current team behaviour. The tone was threatening. This one communication had badly damaged morale and made people very defensive.

Key Leadership and Management Requirements

As mentioned above, the same core principles of leadership and management apply in remote/virtual environments as elsewhere. However, based on the above requirements for success in remote/virtual teams, certain aspects can be emphasised.

Developing and maintaining the operating framework. Leaders need to work with the team and stakeholders to develop an operating framework. This includes the team's core purpose, vision, values/norms, goals, objectives and measures of success. In doing this leaders need to ensure that the work of the team fits with the wider organisation so that remote and virtual teams do not become disconnected. Once developed the framework needs to be kept alive.

Facilitating self-management. This involves providing necessary resources, managing the team's boundaries with stakeholders, ensuring technical staff are customer focused, and focusing on learning and development. In particular the leader needs to be a "role model" for learning. The leader also needs to give more authority and day-to-day control to team members. This is linked to the key issue of trust. People with a particularly high or low desire for control run the risk of either over-controlling or abdicating. Leaders need to sense when intervention is required and do so in a way that supports and empowers. They also need to keep an eye on team member stress levels and resilience, as ambitious high performers can take on more and more in this environment until they are overloaded.

Fostering openness and trust. The leader is a key role model for this. Keen self-awareness and social skills are needed to achieve the authenticity required. Deploying several of the leadership and management strategies suggested in this guide will help. Another key factor is how the leader handles team career issues. Remote and virtual team members need to know more than most that their careers are being looked after by the leader. Giving due recognition and reward for work, supporting entry to the team as well as facilitating smooth career moves are important for building and maintaining trust.

Facilitating good working relationships. Leaders need to role model collaboration. They also need to understand interpersonal and group dynamics and be able to support the team through the different development stages. In a multinational setting the leader needs to be culturally aware in this regard. As mentioned above, the leader needs to proactively facilitate virtual team relationships.

Communicating key information and decisions quickly. Good communications have been highlighted as a critical success factor in remote/virtual teams. Leaders need to demonstrate this by communicating key information and decisions quickly to remote/virtual team members and ensuring that, where appropriate, a dialogue can take place.

Celebrating success. Leaders need to celebrate the achievement of key milestones and the completion of projects by openly acknowledging team members and their accomplishments.

Focus on key priorities. Just as a team needs shared vision, there also needs to be shared commitment to the key priorities, or key deliverables for the team. In a fast paced and rapidly changing world with fewer resources and different locations, focus on the key deliverables is essential to ensure the team stays on track²⁰.

²⁰ This is something that many teams find very difficult for several reasons. Attachment to the old way can be a barrier to organisation change. It can also be a personal security issue about being "busy" rather than focusing on the core "business". Some highly driven leaders create great project "machines" that churn out initiatives and flatten the morale and energy of team members. As Peter Senge (1999) has pointed out, workload is a key obstacle to organisation change. The agenda needs to be focused from the top of the organisation to ensure delivery and results.

Project management disciplines are helpful in a remote/virtual environment. To a large extent this depends on the nature of the task. Tasks can be more routine, technical and administrative or more strategic and complex. In today's remote and virtual environment, where empowerment and local responsibility are promoted, more people are required to do strategic and complex work. This work requires more integration of effort across the enterprise. Project management disciplines are helpful for managing the task in these circumstances. They ensure sponsors and other stakeholders are "signed up" to the work being done. They make the deliverables, milestones, timescales and success measures visible to all in a remote and virtual environment. They facilitate the establishment of clear expectations that support trust building.

Regular communication by all available means. Ongoing mutual communication is required to ensure that work "evolves" real time rather than becoming fragmented and to identify early on opportunities being missed or problems emerging. The best communication gives as much information about an issue/task as possible so that dialogue can take place and different people have the opportunity to shape what is happening. The pattern of "electronic" communication can be related to stages of team development, just as face-to-face communication can. Communications tend to be more unilateral and bilateral in the early stages. Ongoing mutual communication is characteristic of high performing teams²¹. Managers would do well to establish the pattern of communication present in their teams and the degree of mutuality and dialogue that exists.

Performance management is taken very seriously. In an environment requiring high levels of trust people need to be rewarded for excellent work and those not performing need to be supported and, if they cannot improve, encouraged to find a different place for their talents. Research into adventure education programmes shows that perceived low support from one individual in a group is a significant predictor of reduced team resilience, which can impact on team performance.²² Leaders need to be wary of negative group members and have the courage to tackle underperformance rather than letting it drift.

You know your team personally – and they know you. The best leaders in any context know the people in their team well – their motives, values, interests and personal circumstance – and can get close as well as keep an appropriate distance when necessary. Your team also needs to know you in the round. Working remotely can mean that team members see 'snapshots' of your style and approach that will be influenced by the immediate needs of the situation – often problems!



²¹ See note 12 above.

²² Neill and Dias (2001)

Questionnaire and Action Planning

The following questionnaire and action plan guidance will help you to develop an action plan for your team.

Questionnaire

Rate the questions below on a scale of 1-6 where 1 represents “totally uncharacteristic, no evidence of this in the team” and 6 is “totally characteristic of the team”.

Inclusion	
1. Team members get to know each other beyond the work	
2. Necessary information is available to all team members	
3. There is regular mutual communication between team members	
4. The team share a common purpose	
5. All team members are clear about their role and contribution	
6. New member entry to the team is supported	
7. Where necessary cultural training takes place	
8. News about team members is shared regularly	
9. The team leader knows team members well	
10. Stakeholders are appropriately included	
Total	
Control	
11. Recruitment procedures are fit for purpose	
12. The team shares a common vision, values and goals	
13. Responsibility and accountability is delegated appropriately	
14. People are clear about expectations for performance and behaviour	
15. Differences are proactively managed	
16. Timely and accessible training and development is available	
17. Key core processes and responsibilities are clear to all	
18. Underperformance is tackled early	
19. Successes are celebrated across the team	
20. Team members are focused on stakeholder needs	
Total	
Openness	
21. Team relationships are proactively facilitated	
22. There is good feedback and listening	
23. Team members develop their personal awareness and relationship skills	
24. Problems are shared and worked on together	
25. Beliefs and assumptions are challenged	
26. People hold each other to account	
27. Barriers to progress are surfaced and confronted	
28. People work through their differences	
29. People tell the truth	
30. Openness is practiced beyond team boundaries	
Total	

Team Action Planning

Based on your responses to the questionnaire develop a draft team action plan.

1. Identify the key strengths and weaknesses (is there one stage that scores significantly lower/higher than the others? Why might that be?)
2. Prioritise the top three areas for action
3. Think about the following questions:

What might you stop doing?

What might you start doing?

What will you continue doing or improve on?

What will you change or do differently?

What strengths will you build on?

What further management or leadership development do you need, e.g. developing emotional intelligence?

Are there any quick wins?

Go back over the guide to find pointers for your action plan.

You could also engage the team by involving them in diagnosis and planning for improvement – something that would support all three stages of relationship development.



Conclusion

Anybody leading, managing or working in a remote/virtual team needs to pay attention to the key differentiators of location and technology. There needs to be increased effort to meet the needs of others in this environment – a shift in thinking from the relative informality and familiarity of co-located teams. However, the fundamentals of leadership, management and team development are the same. Getting this right can have a big influence on well-being and performance.

Keep well wherever you are.

David Willcock MSc. FCIPD MAC

[Liberating Potential Ltd.](http://www.liberatingpotential.co.uk)

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