VIRTUAL GLOBAL TEAMLEADER

Product White Paper

Managing Virtual, Agile and Outsourced Teams using TeamLeader ™

VIRTUAL GLOBAL TECHNOLOGIES

TeamLeader ™

Background

T oday's virtual teams are tough to manage – often involving matrixed fragments of scattered employees and contractors from multiple disciplines. They're more difficult to motivate, coordinate, and hold accountable.

At the end of the day, managers are often left feeling powerless and in the dark – with work falling through the cracks and no easy way to report. This shift has happened during a time when managers are expected to do a lot more with less.

In 2006, Virtual Global worked with NASA to create an easier way to manage agile teams of the future. That future is now. TeamLeader™ is a SaaS application for managing teams, agile workloads and their documents.

This whitepaper introduces TeamLeader for managing the special challenges associated with virtual, agile and outsourced teams.

Introducing TeamLeader

TeamLeader™ is a Software as a Service (SaaS) for interactively managing teams, tracking progress, and reporting on individual performance. It gives managers a viable alternative to 'managing by email'. TeamLeader compliments, rather than replaces, project planning systems. TeamLeader brings all stakeholders together --- managers, team members and business owners alike --- into an online workplace where they can work together more like real-world teams.

TeamLeader is designed to strengthen any size team - whether a small or global enterprise. Using TeamLeader, managers can assign, track and manage work. Team members can collaborate to get the work done. And, business owners can monitor performance trends.

The ***Teamwork Tool*** is the heart of TeamLeader. It gives managers a window into who's doing what; and it lets managers assign and oversee agile workloads… managing sprints, backlogs, workloads, priorities, artifacts, and reports. In turn, team members can take advantage of various collaboration tools to get their work done.

TeamLeader strengthens teams in several ways:

- **Connect your teams** – No more "out of sight, out of mind" syndrome with globally distributed employees. Even remote employees feel integral to the overall team. Managers can assemble and integrate matrix teams, consisting of contractors and employees from multiple locations to work together.

- **Get your arms around everything going** on – Always know who is doing what, when things are due and what is late in real-time. When a manager logs on, the first thing he sees is his team. From there, the manager can easily see who's logged on, who's working on what, who is late, what's coming up next, or even details of work completed by a team member several months ago. The manager can then drill down into any team member's workload, changing priorities, attaching documents, viewing history, or whatever needs to be done. For managers, this extra insight is significant, considering that the team may be scattered across cities or countriesWW.
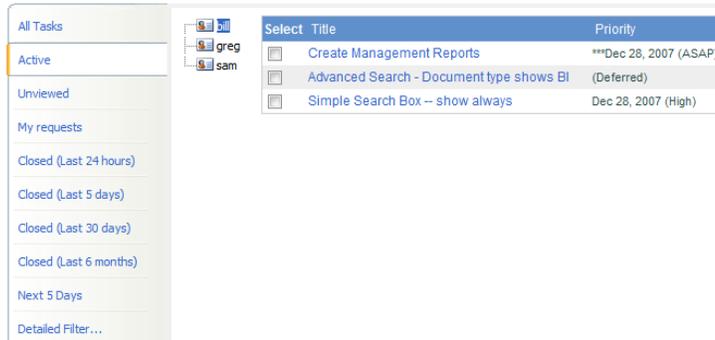
- **No more work falls off the** plate – Once an item is entered into TeamLeader, it can't get lost like an email.

- **Improve accountability and follow-through** –Tasks and subtasks always have an owner, so there is no doubt who is responsible for what.

- **Performance Reporting and Spring Retrospectives** – TeamLeader remembers what you can't. You can use the history for performance evaluations, mishap management and remembering what happened.

- **Streamline Communications** - Workflow between teams and individuals is nearly instantaneous because it is automated, so your teams will be more efficient.

- **Consolidate information** – TeamLeader creates a knowledgebase as team members work. You'll always have access to work history and relevant documents.

- **Reporting** – The old saying is "out of sight, out of mind", and such is true for virtual teams. TeamLeader builds a reportable knowledgebase as team members work. At any time, managers can run reports on what is late, what is due next week and who's doing what, etc. They can graph performance trends to identify problem areas and resource bottlenecks. They can even create their own management reports, thus eliminating the need for internal status reports.

- **Know where your budget is going** – 75% of your operational costs are on your people, so maximize their value. TeamLeader makes it easier to remember who did what for employee evaluations. You can analyze performance trends and allocate your resources more wisely.

- **Outsource more effectively** – TeamLeader makes it easier to manage virtual teams, so you can reach stronger talents, get closer to your customers, reduce travel, increase productivity by working around the globe, and save a LOT of money!

- **Results-Oriented Culture**– Awareness of workloads and individual accountability will skyrocket, so your teams are more productive. And unlike many sharing-oriented collaboration systems, everything in TeamLeader revolves around taking action and producing results.

Instilling a Results-oriented Culture

A primary objective of TeamLeader is to instill a results-oriented culture into your organization. A few simple suggestions – if properly implemented – can make a major positive impact toward that end. Within a couple weeks, your team members will be more producing more results by working smarter not harder.

Team members can undertake a major shift toward results-orientation by adopting three simple rules. Managers should work with team members to communicate t

- **Definition of "done":** A task is not done until TeamLeader says it is done. Part of the definition of "done" includes closing the task in TeamLeader)

- **Definition of "asking for it":** You didn't ask for it, unless TeamLeader says you asked for it. Part of the definition of "asking" is to send a TeamLeader task. Instead email, sticky note, or Outlook task, make sure that a TeamLeader task exists.

As a manager, the best thing you can do is respond positively to what you see in TeamLeader. If a task is late, seek with an open mind to understand why it is late. A trend of late tasks may not represent team member issues. It may instead represent resource challenges or overtasking; communication barriers or other blockers within the organization. The point is to discover and address the root issues. Managers can also use TeamLeader to remember accomplishments for annual employee performance reviews.

As an ironic side effect of TeamLeader, team members may be tempted to complain about growing workloads. All of the sudden, they log in to see a workload that [seemingly] didn't exist months prior. Managers and team members need to reprioritize, reassign and otherwise manage their workloads. The increased workload reflects a heightened awareness of previously hidden work that already existed. Invisible work becomes visible, and ambiguous work is transformed into responsibility.

"Late task reports" may convey any number of root causes, including but not limited to: resource bottleneck, performance issues, or a simple busy period. The reports are not intended to be a reflection on the employee alone, but rather a flag than some issue exists.

TeamLeader Features

TeamLeader is an easy-to-use, 100% web-based program that offers all the features outlined below.

Team Management and Reporting

- Team management allows you to manage dispersed teams from your desktop.

- The Timesheet function keeps track of the time users are spending on particular tasks.

- Workshops keep related project information in one place.

- Disabling/Enabling of Workshops by System Administrator

- Task management is used to assign, track and manage tasks.

- Status reporting on late tasks, upcoming tasks and more.

- Custom report designer allows you to create custom management reports.

- Workshop Security allows the creation of Roles, Members, and Privileges for workshops.

- Business intelligence manages investments in people by allowing you to identify your under-achievers, over-achievers, resource bottlenecks, etc.

- Time and cost tracking for each task is a helpful feature for contractors and offshore outsourced work so you know where your budget is going.

- Form Management allows you to make your own forms to capture data.

- Product Integration from Alfresco, Dimdim (lab management, video/audio, whiteboard, & shared desktop), Microsoft Outlook, and Microsoft Project Imports/Exports. (Note: All Product Integration tools are optional)

Team Collaboration

- Presence awareness so you know who is logged in and what each team member is working on no matter where the team members are located.

- Workload management neatly organizes and filters workloads within hierarchical folders.

- Discussions allows you to brainstorm about activities with notes neatly filed away.

- Internal mail sends messages to team members.

- Contact management allows the sharing and managing of contact information.

- File Cabinet shares and tracks files, documents, forms, checklists, contacts, etc.

- Calendar view keeps your calendar current with task deadlines as you work.

- Email notification keeps everyone in the loop about progress

- Users can keep in contact using the real time Chat feature.

- Recycle Bin keeps all items that you delete from the system so that if you need them in the future you can restore the items.

- Remote desktop integration creates a seamless integration to the free VNC open source remote desktop services. (beta)

- Instant Messaging Chat with other team members.

- POP (incoming) mail coordinates with non-TeamLeader users.

- Document versioning allows documents to be automatically organized in hierarchical structure as team members work. TeamLeader always displays the most recent and allow for rollbacks if necessary.

- Asynchronous communication allows distributed teams to work when they are awake and keep projects moving through the night.

- My Preferences section allows you to change passwords, set up notifications and managed your personal information.

- The Spreadsheet function allows you to create spreadsheets similar to Microsoft Excel that can be shared within a workshop.

- Attach important Notes to a task.

- Tray Notifier is installed into your taskbar to notify you when tasks are coming due.

- System Searches are available to assist you with locating an item within your workshop.

- Software Bug Reporting allows you to report any issues you experience with the program to the developers.

Process Management and Workflow

- Lifecycles configure custom routing lists.

- Rules allow for programmatic workflow.

- Electronic signatures track and manage approvals.

- The Historical audit trail always access to the " who, what, when and where" of completed tasks.

- Form designer allows you to design, route, and report on forms, with no programming or database experience.
- Checklist designer guides team members through repeatable processes.

Knowledge Management

- The Integrated knowledgebase means that there is no need for costly data warehousing or systems integration projects.
- SQL backend scalable for enterprise teams.

Ease of Use

- The Hosted service provides immediate sign up and login.
- The Outlook look-and-feel means lower training costs and faster implementation.
- Templates simplify data entry for redundant activities.
- Drag and drop files easily add documents to the repository.

Advanced Features

- Security configuration is flexible.
- System Settings allow the configuration of TeamLeader environmental variables.
- Plug-in developer's kits integrates Web applications to extend the platform.
- Data dashboard allow you to slice and dice form data on the fly.
- Customizable System allows the incorporation of images, text, and other formatting to personalize the user interface.
- Online Account Subscription information and pricing.

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