

How Web 2.0 Can Make a Virtual Account Team Hum

With virtual workgroups becoming commonplace, sales organizations are adopting collaborative tools to become far more productive.

By Deborah Asbrand

It is easy to see why virtual sales teams are so popular. Companies today routinely span the globe, so getting work done often means collaborating with colleagues wherever they are and whatever the time of day. But that is where virtual teams can get tricky, particularly for large and midsize companies.

Reaching out often involves crossing time zones and melding different styles. Because teams have to juggle details to find the right people and information, things can and will go wrong. Critical sales documents such as pricing guides from marketing and winning proposals from colleagues, for example, may reside on the laptops of a few individual sales reps yet remain inaccessible to the rest of the team or become dangerously out of date.

To bridge the gaps, more companies are turning to Web 2.0-based communities and hosted services such as social-networking systems, discussion platforms, and wikis. They are finding that their collaborative tools promote the kind of easy information sharing and enterprise search that help account teams work smart when they work virtually. Virtual sales teams are spreading the Web 2.0 word. Now companies are learning how to use the technologies to create a meaningful experience for the growing ranks of dispersed workgroups.

A New Take on “Virtual”

If you think you are hearing more about virtual teams these days, you are right. For one thing, more companies rely on far-flung sales teams that are well suited to today’s global markets. For another, the concept of “virtual” has expanded. The idea of distance, it seems, is fluid, as companies discover how useful these tools can be for team members who are working in different countries—or down the hall from one another.

“Virtual teams used to be defined as people geographically dispersed,” says Jill Nemiro, lead editor of *The Handbook of High Performance Virtual Teams*. “Now we refer to the 50-foot rule of collaboration.” Nemiro says that distance—approximately the width of a basketball court (50 feet or 15.24 meters)—is the limit at which co-workers’ ability to work together face-to-face rapidly declines.

So “virtual” no longer applies only to those working across countries or continents. “Virtual teams can be people working on different floors of the same building,” Nemiro says.

Collaborative tools promote the kind of easy information sharing and enterprise search that help account teams work smart when they work virtually.

Figure 1

Collaboration Is a Competitive Advantage

Collaboration technologies are a key driver of organizational performance worldwide and offer multiple benefits.

1. Reduce costs associated with face-to-face meetings.
2. Enable working with others outside of the traditional office boundaries.
3. Enhance teamwork and increase worker productivity, regardless of location.
4. Help users more effectively control and manage demands on their time.

Source: Frost & Sullivan survey of 946 IT and business decision-makers in Europe, Asia, and the United States, “Meetings Around the World: The Impact of Collaboration on Business Performance”

Research Update

Because of this shifting concept, people are growing more accustomed to spread-out workgroups and more open to their benefits. A research survey by Frost & Sullivan found that 70 percent of IT and line-of-business decision-makers say collaboration technologies connect them more positively with their work. And 60 percent of those surveyed agree that conferencing and other communication technologies reduce the need for business travel (see chart, “Collaboration Is a Competitive Advantage”).

Making Virtual Teams More Viable

By necessity, virtual account teams are growing in number. But how can companies make their virtual teams hum with the same enthusiasm that is possible in the best face-to-face meetings? Companies are rising to the challenge, mastering virtual team management by using Web 2.0 technologies and by following the best practices of industry leaders (see chart, “Making Virtual Sales Teams Work”). Using collaboration tools to streamline workflow processes can be particularly effective.

CGI Insurance Business Services needed to marshal its sales resources to act more quickly on new business opportunities. A provider of IT and business-process services, the Canadian company’s proposal process bogged down with an awkward workflow that relied on e-mail, conference calls, and face-to-face meetings. The process also demanded significant travel.

Deploying a central, shared workspace stepped up CGI’s teamwork and sped its ability to capitalize on prospects. With the new system, based on Microsoft Office Professional Plus 2007 and Microsoft Office SharePoint Server 2007, CGI now reuses the latest sales and marketing content and completes its proposals faster and at lower cost. Plus, an automated notification workflow quickly routes proposals along their review path.

For CGI sales reps, the quicker turnaround means more time to spend with clients. The result is a deeper understanding of business needs and better crafted proposals.

How to Find What You Need

Another important benefit of the collaboration systems that are gaining ground in sales is improved document searching. As companies pour the trove of documents stashed on local hard drives into public pools of data, finding what and who is needed can become an art worthy of a research librarian. Enterprise search, in many cases included as part of Web 2.0 collaboration software, is creating order out of the clutter and leading to improved sales productivity.

At NetIQ, an enterprise security software firm, searches of the company intranet often turned up disappointing results. “Most of our employees went outside our previous intranet to get their work

Using collaboration tools to streamline workflow processes can be particularly effective.

Figure 2

Making Virtual Teams Work

Establishing ground rules is key to successful virtual teams. Without them, duplication of work and misunderstandings can occur. Here are a few expectations team leaders should consider setting.

- **Establish availability and acknowledgement procedures.** When will team members be available and accessible? How can they be reached? How will they acknowledge they received a specific communication? This point is especially important when members hail from different time zones.
- **Define what communication methods will be used.** Members need to specify when e-mail, instant messaging, telephone, intranets, portals, conference calls, and Web conferencing are appropriate to use, and how each will be used.
- **Decide who gets what communication.** For large teams—those over 20 members—what team subsets can be created?
- **Establish review and revision norms.** Who reviews what portions of the work? Who has final approval?

Source: Nemiro, Jill. *Creativity in virtual teams: Key components for success* (Pfeiffer, 2004).

Research Update

done,” explains Josh Harbert, senior manager of Web marketing for NetIQ, located in Houston’s Galleria area.

The result was informational disarray, especially among NetIQ’s 400-plus salespeople. Out-of-date materials circulated freely. Sales reps frequently called the product marketing team in search of hard-to-locate product and sales information.

With its rollout of Microsoft Office SharePoint Server 2007, NetIQ debuted a new intranet and focused on search as a key component. The revamped intranet includes product data, buyer profiles, and competitive information.

“We have structured and related those pieces of information to one another so that users now can view the information in different ways,” says Todd Tucker, director of product marketing. “For example, a salesperson can see the specific product data or sales strategies that are most appropriate for a particular buyer profile, such as a security officer or IT operations manager.”

Calls to the marketing group dropped 90 percent. Productivity surged. “Because our salespeople are finding more accurate information instantly, they can spend more time selling,” Tucker says. “That is a huge benefit.”

By using Web 2.0 technologies to create greater closeness and efficiency among virtual account teams, sales organizations are returning to what they do best. Collaborative tools are letting sellers sell. And that builds team satisfaction while boosting the company’s bottom line. ■

Related Resources

[Web 2.0 marketing: What it can do for you](#)
[Marketing how-to guides](#)

[Enhancing customer relationships with technology](#)

[Build Customer Connections](#)

[Business Productivity Infrastructure Optimization](#)

“Virtual teams used to be defined as geographically dispersed. Now they are people working on different floors of the same building.”

– JILL NEMIRO
EDITOR, THE HANDBOOK OF
HIGH-PERFORMANCE VIRTUAL TEAMS

Deborah Asbrand is a senior editor for Triangle Publishing Services Co. Inc. of Newton, Mass. Her articles have appeared in The Industry Standard, The Boston Globe, Corporate Dealmaker, Forrester Reports, and MIT’s Technology Review.

This research project was funded by a grant from Microsoft.

Microsoft[®]

© 2009 The McGraw-Hill Companies Inc.
All rights reserved.