Virtual Teams

Guide

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For years, even prior to the pandemic, the Transition movement has embraced virtual collaboration and using online tools to connect, share ideas, and build collective intelligence. This has been made possible by the arrival of faster internet speeds, digital platforms, and new software tools that enable teams to work remotely without needing to travel. Any team can now be more inclusive by connecting with and learning from people all over the world. By working virtually, you can also reduce the environmental impact that comes with travelling to meet in-person.

Transition Network International and various Transition Hubs work together online to plan events, translate materials, and coordinate activities. Meeting in-person still happens occasionally, since that can help people to build relationships and stay connected. The relationships people have are the foundation for any kind of team, including a virtual team, to work together most effectively (see Effective Groups).

Key Principles

Principles worth considering include:

1. Meet in-person

Meeting in-person is great, so aim to do this whenever you can. Try to meet physically early on to help build relationships and trust. This will help your virtual team to work effectively later on (see Building Trust).

2. Use accessible and reliable tools

Not everyone has access to a really fast computer and great internet connection. Try to use tools that are simple enough and accessible to everyone. It's easier to use the tools that most people already use. Try to only suggest new tools when necessary, and if everyone finds them easy to use. With online tools, value reliability over innovation. Try to get everyone on the same platform and have stability, rather than using a cutting-edge solution that team members struggle to use.

3. Take time to clarify roles and responsibilities

This is a key step when setting up a successful virtual team. Communication can be more limited in virtual teams, and harder to understand. Therefore, having clear roles helps avoid confusion, conflicts, and misunderstandings. In addition, this allows team members to focus on their specific tasks and have a sense of ownership (see Group Agreements).

4. Find a rhythm

Working as a team in a virtual setting happens both during meetings and in-between them. Finding a regular "rhythm" of work can help team members feel connected. For example, you could have meetings or activities on the same day and time each week. The same goes for in-between meetings. Regular communication daily (such as checking-in via a messaging tool once per day, or several times per week) will help everyone remain focused on what they are working on.

5. Treat each other with compassion

Behaviour and conduct in the virtual world is as important as it is in the real world. Aim to treat each other with compassion and respect; aim to maintain an awareness of everyone's differences (see Empathy and Compassion, see Compassion for Challenging Behaviour, see Respect for Diversity, see Respecting 'Yes' and 'No', see Sharing and Celebrating Failings).

6. Track your progress and celebrate achievements

When working virtually, it can be very helpful to intentionally set time limits for delivering on tasks, and keeping everyone aware of how the work is progressing. This could mean progress reports during meetings, or a collective online checklist where everyone contributes. And remember to celebrate whenever an item or step is completed!

7. Prioritize well-being and balance

Meeting virtually usually means getting work done by spending time in front of a screen, rather than doing work outside in the community. This can cause some overwhelm, stress, or feelings of frustration (see Burnout to Balance, see Self-Care: Physical and Sensory, see Self-Care: Nature). Prioritising the well-being of team members allows everyone to genuinely engage with the work. Take time to create the conditions that are supportive for everyone. For example the frequency of meetings, the flexibility of deadlines, and so on. Remember to lead by example and tend to your own self-care.

Communication Types

The two most common types of communication that happen online are: real-time (synchronous) and delayed (non-synchronous). Virtual teams can use a mix of both to get work done.

Real-time Communication

Real-time communication happens at the same time. For example, when everyone meets together at the same time via conferencing software.

Benefits	Challenges
- Can help build relationships. - Conversations can be richer and more involved.	- Getting everyone together at the same time can be difficult to organise or schedule. - Not great for sharing large amounts of information. - If your technology fails then the meeting has to end.

Delayed Communication

Delayed communication happens when you are all working on a project at different times. For example: writing in forums and online groups; commenting on social media; and working on shared documents by posting your comments.

Benefits	Challenges
- Good for presenting and discussing complicated ideas over a period of time whenever you are free to do so. - Allows time for people to reflect and think about ideas. - Most tools keep a record of what has changed, so you can track how ideas have developed.	- Not that good for making urgent or important decisions. - People can misunderstand what is being said, since asking questions can be tricky. - People may not contribute.

Tools for Virtual Teams

There are many different software tools that you can use. The key is to select tools that meet your needs, are accessible in terms of cost (many are free), and most importantly, are easy to use. Accessibility and user-friendliness ensure that everyone in the team can participate effectively.

To decide on the best tools, discuss possible options with your team. You can start by listing the ones that your group already uses. Then categorise them by function and agree on which tools to use for different types of communication. You might use one kind for real-time interactions, and another for delayed communications. Consider people's comfort levels with technology and identify who may need extra support. You might consider producing a quick user guide or share a video tutorial.

Below is a list of commonly used tools in several categories. These are not an endorsement, they are simply solutions that many Transition Initiatives have found useful. You might consider using 'open source' tools if you do not wish to use corporate software. In general, it's best to go with tools your group are already familiar with. If your team has concerns about privacy or security, then you can learn more about each tool individually. For more advice on using secure tools, check out the archive of Tech Tools for Activism.

Virtual Conferencing and Meetings

- Zoom – Widely used for video meetings, webinars, and screen sharing.
- Microsoft Teams – Integrated with Office 365, great for team collaboration and meetings.
- Google Meet – Free and easy to use, integrated with Google Workspace.
- Webex – Secure and feature-rich, often used for business meetings.
- Jitsi Meet – Open-source and privacy-focused alternative.

Online Collaboration on Documents

- Google Docs – Real-time document collaboration with commenting and version control.
- Microsoft Office 365 – Cloud-based collaboration on Microsoft documents.
- Notion – Combines note-taking, databases, and collaboration in one workspace.
- Miro – A digital whiteboard for visual collaboration, brainstorming, and teamwork.
- MURAL – A collaborative online workspace for visual thinking, planning, and design.
- Dropbox Paper – A simple tool for team document collaboration.

Shared Folders and File Storage

- Google Drive – Cloud storage with easy sharing and integration with Google tools.
- Dropbox – Secure file sharing and syncing across devices.
- Microsoft OneDrive – Works well with Office 365 and Windows users.
- Box – Business-focused cloud storage with advanced security.

Shared Calendar

- Google Calendar – Easy scheduling, sharing, and integration with Google services.
- Microsoft Outlook Calendar – Business-friendly, integrates with Teams and Office 365.

Messaging and Team Communication

- Slack – Popular for workplace messaging, file sharing, and integrations.
- Microsoft Teams Chat – Built into Office 365, ideal for businesses.
- WhatsApp – Simple and widely used for quick team messaging.
- Telegram – Secure and supports large group chats.
- Discord – Originally for gamers but widely used for team communication.
- Google Groups - Email lists
- Facebook groups - Collaborative decision-making

Emailing

- Gmail – One of the most popular email services, with strong integration into Google Workspace.
- Microsoft Outlook – Business-oriented email, works well with Office 365.
- ProtonMail – A privacy-focused, encrypted email service.

Setting Up a Meeting Date

- Doodle – Simplifies finding a common meeting time through polls.
- When2meet – Great for coordinating availability across different schedules.
- Google Calendar Appointment Slots – Allows scheduling within Google Calendar.
- Microsoft Bookings – Works within Office 365 for scheduling meetings.

Surveys and Forms

- Google Forms – Free and easy-to-use survey and form builder.
- Typeform – Interactive and visually appealing forms and surveys.
- SurveyMonkey – A widely used survey tool with advanced analytics.
- Microsoft Forms – Integrated with Office 365 for easy survey creation.
- Mentimeter – Live polling and interactive presentations for engaging audiences.

Presentations

- Google Slides – Cloud-based presentations with real-time collaboration.
- Microsoft PowerPoint – The industry standard for presentations.
- Prezi or Sozi– Offers dynamic and engaging presentations with a zoomable canvas.
- Canva – Easy-to-use graphic design tool with presentation templates.
- Mentimeter – Live polling and interactive presentations for engaging audiences.

Community developed alternatives for tools

- Only Office - Online office suite
- Only Office - Shared folders
- Only Office - Shared calendar
- Aktivix - Email lists
- MediaWiki – Collaboration and documentation platform (Not available unless you host it on your server)
- Loomio - Collaborative decision making

Roles in a Virtual Team

When working virtually, how you run meetings is very important (see How to Run Effective Meetings). It is usually most effective if people take on a couple of specific roles. These roles get easier with practice, and team members can rotate roles to build skills and cover for each other (see Leaderfull Groups). These roles are explained in greater detail at the end of this document (see below).

Team Guardian

The Team Guardian is like the Master of Ceremonies (MC) of the team's communication. They organise the collaboration between meetings, such as scheduling, sending updates, preparing agendas, maintaining shared folders, and reminding members about actions. If they feel unable to perform the role, it is best to pass it on to someone else.

Meeting Facilitator

The Facilitator is the Master of Ceremonies (MC) of the meeting only. They guide the meeting to keep it focused, structured, and inclusive. They ensure the technology works, encourage participation, and help regulate the discussion. A host or producer may assist by managing any online chat features and supporting the Facilitator.

Keeper Roles

The above two roles help a team to manage meetings so that they run smoothly and effectively. 3 other roles are also helpful for any kind of meeting.

- **Keeper of the Record** – Takes meeting notes and ensures accuracy with the team.
- **Keeper of the Time** – Tracks time and reminds others of the agenda.
- **Keeper of the Heart** – Observes the meeting's emotional atmosphere and intervenes if needed to maintain a positive vibe.

Role - Virtual Team Member - overview of best practices

In General

- As a virtual team member your role is to make your knowledge, skills, focus, time, and energy available to your teammates in order for you all to co-create the agreed outcome together.
- Virtual teamwork is as demanding as any kind of teamwork, sometimes even more demanding. Be careful not to take on too much (see Inner Feedback for Personal Resilience, see Respecting 'Yes' and 'No').
- A virtual team (like any kind of team) relies on the relationships you have with each other. Whenever possible, use video meetings to support being in good relationship with each other (see Building Trust).

Before online meetings

- Prepare by reading all the relevant information shared with you or sent to you.
- Check your internet bandwidth. You can measure your bandwidth by visiting Speedtest, and comparing the results with your platform requirements.
- If you are using Zoom check your equipment and settings by visiting http://zoom.us/test.

During online meetings

- Writing, reading, or editing documents during the meeting might not be the best use of your time. During meetings it may be better to focus on listening and talking to each other.
- Reduce distractions: set your video meeting window to full screen to focus on meeting participants only. Turn off notifications on all your devices.
- Join with your real name (and location) as your screen name.
- When joining in audio-only mode, use the chat feature to communicate with the Facilitator and other participants.
- During the meeting use the chat feature for signals only, or to share when asked; do not engage in parallel chat discussions, which will only distract you and others.

After online meetings

- Keep communication with your teammates going. Make yourself available by reading their messages and responding in a timely manner. Let them know when you're not available. Pass on your tasks to someone else if you will not be able to do them.
- Meetings are ideally a bridge between the work your team did previously and the work that comes after.

Role - Meeting Facilitator - overview of best practices

In General

- The Facilitator role aims to assist the team to make all the necessary decisions within the time available; and to make sure everybody is involved in discussions and decision-making.
- The larger your group is and the shorter the time you have, the more you will benefit from inviting structure to have a successful meeting.

Before the Meeting

- Prepare the agenda by reviewing the meeting's goals, structure, and key points. Ensure that the agenda is clear and shared with everyone in advance.
- Confirm the technology by testing the chosen online meeting platform to ensure it is working smoothly. Confirm that all participants have access and know how to use it.
- Coordinate with other Roles by checking in with the Team Guardian, Keepers, or any other relevant participants about their responsibilities.
- Set expectations with the meeting participants regarding participation, time management, and etiquette.

During the Meeting

- Guide the discussion by keeping the meeting focused and on track. Ensure the group follows the agenda, and step in to refocus the conversation if it goes off-topic.
- Ensure participation by making sure all participants have a chance to contribute, either by encouraging input or directly asking individuals for their views.
- Manage the time and adjust as needed to cover all agenda points.
- Keep an eye on technology by monitoring for any technical issues and helping to resolve them quickly to avoid disruptions.
- Maintain a positive atmosphere by watching out for group dynamics and addressing any emerging tensions or distractions. Ask for help from the Keeper of the Heart if needed.

After the Meeting

- Follow-up on action items so as to ensure that all participants are clear on the next steps, responsibilities, deadlines, and time limits.
- Ensure that someone (usually you or the Team Guardian or the Keeper of the Record) shares the meeting notes with everybody.
- Ask for feedback on how the meeting went. Reflect and make adjustments for next time.

Role – Team Guardian – overview of best practices

In General

- The virtual Team Guardian aims to coordinate the ongoing process of online collaboration. You can help to develop the relationships between the virtual team members by moderating online communication and by keeping up the momentum (particularly between meetings) of the joint work until it is completed.
- Meetings are the bridge between the work done before and work done after the meeting.
- A virtual team is most effective because of strong relationships with each other, not because you've chosen to use a certain online platform or tool.

Before the online meeting

- Stay in touch with the virtual team members on a regular basis. Try to agree on a message response time and your preferred communication platform.
- Prepare and share the proposed meeting agenda in advance, taking into consideration what topics need to be discussed and agreed in order to move the work forward.
- Share all relevant information with the meeting participants well in advance, so they have time to read it.

During the online meeting

- At the start of the meeting, make sure the agenda is discussed and agreed. Make sure that the meeting roles are shared out, and that the next meeting is scheduled.
- It is good practice to rotate the various meeting roles, so that every team member has an opportunity to learn how to carry out each role. This might mean balancing the efficiency of a meeting with the learning of your teammates.
- You may or may not be in the Facilitator role: do what works for your team.

After the online meeting

- Ensure that someone (yourself, or the Facilitator, or the Keeper of the Record) reviews the meeting notes and edits them for clarity, accuracy and readability.
- Ensure that someone (yourself or the Facilitator or Keeper of the Record) shares the notes with all team members. Ask those who attended to review the notes for accuracy.
- Stay in touch with your teammates: send reminders and updates at least once a week.

Related Resources

Effective Groups
Building Trust
Group Agreements
Empathy and Compassion
Compassion for Challenging Behaviour
Respect for Diversity
Respecting ‘Yes’ and ‘No’
Sharing and Celebrating Failings
Burnout to Balance
Self-Care: Physical and Sensory
Self-Care: Nature
How to Run Effective Meetings
Leaderfull Groups
Inner Feedback for Personal Resilience

References

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Virtual Team - Wikipedia
Guide to Remote Work - Zapier
Collaboration Superpowers - website
Building Trust Remotely- Simon Sinek
Speedtest

Thanks for input and contributions to:

Hubs Group members; International REconomy Group; Transition Network staff and trustees;
ECOLISE people; European Permaculture Teachers Partnership; European Permaculture Network Vision and Strategy Working Group; South-East European Permaculture Network; Zagreb Permaculture Teachers' Training Course 2015 Team.

Special thanks to Lincoln Loop for their great Ginger 4-part email course on improving remote team communication.

For more resources like this one, go to https://resources.transitionnetwork.org/
or to the Transition Network international website www.transitionnetwork.org

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