

# Herding Virtual Cats: How to Lead Multiple-Office and Off-Site Teams

By Melinda Guillemette and Michelle Golden

**K**nowledge workers are pushing for the flexibility to fit their work into their lives, rather than fitting their lives into their work. This cultural shift is changing the way we do business. Firms are evolving from a “bodies-in-seats, work-till-you-drop” paradigm to something far different.

Where leadership used to be exercised in daily in-person contact and communication, today leadership must also be demonstrated in the vaporous world of virtual communication: Intranet, email, Twitter, Facebook, IM’ing, video, Skype, and telephone. What could once be called bricks-and-mortar leadership is becoming virtual leadership.

Leaders, partners, and managers have been witnessing this evolution long enough to recognize it is not merely a fad. This new way of working requires a new way of leading.

While the traditional office model thrives on a strong culture, a virtual setting requires even more cultural awareness and ongoing attention. Your ability to adapt your mindset, communications, and infrastructure to this paradigm shift will play a huge role in your firm’s success.

There are three things you must do if you want to lead a virtual team:

1. You must articulate the tangibles and intangibles of your firm more consistently and effectively than ever before. Leaders need to deeply understand their employees and align key performance indicators to the firm’s goals and to individuals’ goals. They must clearly define success for employees, including employee roles, achievement markers, and time frames.
2. You must motivate all team members toward top performance—even when no one is looking over their shoulders, as is the case with virtual leadership. Trust at every level of the firm is the key component to motivation. It is built one relationship at a time, one conversation at a time, and one task at a time. Trust drives employee moti-

vation to participate in the firm’s goals and to be a part of its success.

3. You must create an organization that is consistent across geographic boundaries. Virtual leaders need to expend great effort on creating a culture that thrives on independence, initiative, and integrity. They must then ensure that the firm’s infrastructure supports its culture.

These imperatives are linked. Without any one of them, the other two cannot occur successfully.

## Articulate

To articulate effectively in virtual leadership requires firms to have a strong communication ability at the leadership level. One-office firms may be able to get away with incompetent, inconsistent, and insensitive communication and in-name-only leadership. However, firms that want to lead across the boundaries of place and time need to focus intently on these areas because communication and leadership weaknesses quickly become apparent in a virtual environment. The days when “everyone” emails and annual team meetings are the source of firm information need to become a distant memory. Clear, consistent, and compelling communications simply must become an immediate priority.

Virtual leaders can start by being sure the firm’s purpose, mission, and strategy are clearly and consistently communicated. At the same time, leaders need to be sure these things are truly understood and lived by every team member, from partner to receptionist.

Articulating effectively also means knowing who your employees really are, beyond what is in their files. It means knowing at a very deep level what they need from you and your firm and understanding how to communicate it.

## Motivate

The reasons that make an employee eager to come to work every day are changing. Set schedules, a clear

ladder to climb, and graduation-to-retirement career paths just don't fill the motivational bill anymore. They have been replaced by the desire for more immediate fulfillment through flexibility, rapid advancement, and interesting work.

The primary component of motivation is trust. High-trust firms are more likely to provide the motivation our young professionals seek because they are more likely to value and acknowledge initiative, independence, and creative thinking. In *THE THIN BOOK OF TRUST*, author Charles Feltman succinctly defines four distinctions of trust:

1. *Sincerity*: Say what you mean, and mean what you say.
2. *Reliability*: Do what you say you will do.
3. *Competence*: Be able to do what you're doing.
4. *Care*: Have others' interests in mind along with your own.

To this list, one could also add: *sensitivity*. Sensitivity is defined as developing the awareness, desire, and skill to repair a situation when trust is damaged.

Effective motivation requires a willing team. Be sure your team knows the firm's purpose (beyond profit) and that they believe and live it every day. Then, be sure they are consistently recognized and rewarded for the behaviors you want to instill in them. Finally, have the courage to unload those partners and employees who do not believe and live your firm's purpose.

### Create

Virtual leadership depends on a strong, well-articulated, dynamic culture. It requires the right people with the right attitudes. Finding and keeping this type of team will only happen when recruiting, retention, and continuing education on the behavioral skills described in this article get at least as much attention as billable time.

It helps if you hire well and onboard effectively. Do your best to attract people who resonate with your firm's purpose if you want to build the next generation of leaders. You always need to reward results as well, if only to attract those who are driven by dollars. Understand, however, that financial reward attracts worker bees. It takes more than money to attract leaders—it takes people who are devoted to your mutual cause. These criteria for building the right team are appropriate for any firm, but

particularly so for those seeking to create a virtual leadership environment.

Helping your team understand that change is a constant will support a flexible and optimistic culture, which is essential to virtual leadership. Make embracing change a norm across all offices. Recognize and reward those who are creative, open, and collaborative. Counsel those who are negative, resistant, and pessimistic, and if necessary, help them find a more suitable work environment.

Transparency is also an important element of a virtual culture. The more information you share with the entire team, the less opportunity there will be for gossip, rumor, and misinformation to take hold. Sharing financial, operational, and strategic information with team members increases their sense of belonging and commitment to your firm's purpose.

Finally, respecting others' needs is central to virtual leadership. For example, allowing people to have intellectual and physical space in which they can work uninterrupted for blocks of time is critical. That may mean delaying the fulfillment of your desire to get something done in your timeframe. Or it could mean taking a deep breath when a team member has personal needs that overlap or supersede work. But responding positively to your employees as often as possible will reinforce your firm's dynamic culture, and it will attract more of the right kind of team members.

You will need a strong infrastructure to support your firm's virtual leadership. Here are the three most important changes you can make now:

1. Give real-time feedback and abolish annual reviews.
2. Ban the billable hour. Focus on results and value rather than time and efforts.
3. Remember that all the tools and infrastructure in the world won't save you from ineffective leadership and communication.

No doubt about it: the CPA world is changing. It's expanding, speeding up, and reshaping. Demonstrating leadership skills in a virtual environment is an important and inevitable part of this metamorphosis.

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