



Breaking Cultural and Business Barriers with Virtual and Matrix Teams



Company

A financial services company based out of the U.S. with a legacy of over 125 years of financial excellence.



Objective

Cultural sensitization and explaining the concept of Virtual and Matrix Teams for people working in roles of manager and above.



Employees

18,100 (2017)



Solution

A Blended solution that used real-life problem-solving scenarios at the workplace.



Revenue

\$5.38 billion (2017)



Impact

Improved understanding of 'Virtual and Matrix Teams' and lesser conflict in terms of cultural understanding.

The Client

The client is a renowned financial services company based out of the U.S. Offering wealth and investment management services the client serves both high net worth individuals and government agencies. One of the few financial services companies that was not heavily affected by the Great Depression in the 30s or the recession crisis fueled by the collapse of the Lehmann Brothers. The client reported a revenue of \$5.38 billion in 2017.

The Challenge

The client employs a culturally diverse workforce of more than 18,000 staff and operates in 20 countries globally. A significant number of these employees work on multiple projects simultaneously. The challenge is for managers to get clarity on reporting structures, the flexible team composition, understand the cultural differences of their team-members, and manage them effectively.

The operational and reporting matrix includes complex dotted line reporting with many of the managers working with virtual teams for the very first time. This makes it imperative for them to be equipped with the skills to manage diverse personnel and derive the best possible results leading to a positive impact on the business.

The Solution

This was an interesting project for many reasons. The client did not have a lot of information to work on the project. The entire content was developed from scratch through extensive online research, interviews with stakeholders, and feedback from the client.

Origin worked on creating a high-level project execution document and shared it with the client detailing how the eLearning program would be structured. Once an approval was received, work commenced on designing the program.

Origin designed a blended learning program that consisted of 7 courses – with four online training sessions and 3 virtual instructor-led training sessions. The program is structured towards focused learning outcomes and transferability of skills to the job. The content focusses on three key behavioral

- ✎ **Agility** as a key capability for managers to have to drive productivity, adapt to internal and external changes.
- ✎ **Resilience**
- ✎ **Diversity** - Skill to manage matrix and virtual environments

The program starts with a quick introduction followed by a survey for those taking up the program. Designed as a self-awareness tool, the survey prepares learners for the subsequent sections of the program.

Survey

Factor	Disagree			Agree	
	1	2	3	4	5
All my direct reports who work in a location different from mine have a dotted line/local manager available for support and guidance.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
All my direct reports know whom to approach if I am unavailable.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We have clearly defined methods for regular communication between me and my partners working remotely.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
My partners quickly learn political, legal, and accounting considerations in secondary locations as we have resources that cut down their research time.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
My partners readily accept diversity and inclusion in the team as they are well aware of different culture norms.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
My partners know their roles and responsibilities clearly, and they never miss deadlines.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
At any given day, all my direct reports are on the same page regarding project details.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I am able to easily track the task status of all my direct reports during the entire timeline of a project or process.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
My direct reports have no problem prioritizing their project team, local team and functional team goals, when required.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
There is structured communication in place to ensure dotted line/local managers, I partner with to manage my team understand the expectations and goals of my team, enabling them to provide feedback and input when required.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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Key Features of the Solution:

Origin's Instructional Designers created the scenarios and the client SMEs vetted them. Origin also developed the online course template and vILT templates.

Online Courses: The online courses were driven through real time scenarios relevant to the client's virtual working culture. Using just-in-time learning activities, the courses focused on eliciting solutions from the learners, drawing on their real-time experiences in the field. Each online course was designed to be within **1 hour of training**. The courses were developed using Storyline.

vILT: The vILT content offered ready-to-use modules for in-person training situations. It facilitated easy localization for different regions especially with respect to examples, scenarios, and cultural context. All features found in WebEx such as polling, the whiteboard, break discussions PPTs, etc. were integrated in the vILT content.

Problem-Solving Technique:

The key barriers to managing virtual and matrix teams effectively are:



Time Zones



Technology



Culture &
Language



Myriad of Dotted
Line Webs



Distance

We used a scenario-based problem-solving technique. Scenarios where managers would have to resolve an issue and participants were asked to come up with solutions. The assessment-feedback was structured to offer participants the right solution.

This positive approach helped the participants of the program understand the concepts better and boosted course completion rates as well.

The Impact

The client reported a significant improvement in the interaction between managers and their virtual team-members and overall work environment:

Further, the managerial on-boarding process was simplified by the addition of this training program and offered a clear insight into the challenges of handling virtual and matrix teams.

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