# Table of Contents

**Introduction** 3

**About the Authors** 4

**What is Distributed?** 5

**Why This Framework?** 7

## Overview of the Framework 8

- Questions 9
- Virtues 9
- Practices 9
- Communication 11
  - Introduction 11
  - What Do We Mean by Communication? 12
  - How Does Communicating with a Distributed Team Differ From Communicating with a Local Team? 12
- Questions 13
- Virtues 13
- Culture 16
  - What is Culture? 16
  - How Culture Influences Collaboration in Distributed Teams 16
  - How to Work with the Cultural Differences 19
- Questions 19
- Virtues 20
- Organization 21
  - Introduction 21
  - The Building Blocks of a Distributed Organization 22
    - Self organization 22
    - Collocated teams 23
    - Business - IT Alignment 23
    - Knowledge Transfer 24
- Questions 24
- Virtues 25
- Product 27
  - Introduction 27
  - Questions 28
  - Virtues 28
- Leadership 30
  - Introduction 30
Modern Agile 35  
Questions 37  
Virtues 39  
Teams & Tools 41  
Introduction 41  
Tools 41  
Engineering Culture 43  
Devops and Agile 44  
Questions 45  
Virtues 45  

Practices 47  

Communication 47  
10 Tips for Communicating Successfully, by Jutta Eckstein 47  
Inclusion: Build Effective Communication on a Foundation of Trust, by Arjan Franzen 51  
Tools to Spread Knowledge and Communicate Company Wide, by Rajiv Mathew 52  
A Company Wide Communication Rhythm, by Hugo Messer 54  
Get the Key Team Members Together at the Beginning, by Savita Pahuja 55  
From 'Over the Wall' to 'Inception Workshops', by Arjan Franzen 58  
A Guide to Sprint Retrospectives with a Distributed Team, by Realtime Board Team 59  

Culture 62  
Hire for Empathy, by Hugo Messer 62  
Cultural Differences or How I Managed to Learn to Work with Both Dutch and Indians Without Losing My Hair, by Ged Roberts 64  
The Culture Canvas, by Hugo Messer 69  
Culture, Communication, Distributed teams and a Changing World, by Bert van Hijfte 70  
The Culture Map, by Hugo Messer 75  
Spread the Values That Matter, by Hugo Messer 76  
How to Prepare Your Onshore Team - for an Offshore Project with India, by Andreas Brilling 77  
Working Agreement, by Savita Pahuja 83  
Team Alignment and Team Canvas, by Savita Pahuja 84  

Organization 86  
Kaizen to Improve Collaboration, by John Okoro 86  
Team Organization, by Abhilash Chandran 86  
My Ten Best Tips for Effective Knowledge Transfer and IP Protection, by Darel Cullen 90  
6 Patterns of Successful Distributed Collaboration, by Katie Gove 93  
Making Distributed Teams Work: Imitation, Trust, and Control, by Thomas Tøth 95  
Offshore or Nearshore: Combine Customer Service with Global Operational Excellence, by Jean-Paul van Wieringhen Borski and Herke Schuffel 102
Introduction

Distributed teams are the norm for many organisations today. Companies are global, communications technologies allow people to live away from the "office" location and many of the new workforce are nomads. Even though most people will acknowledge the wisdom that collocated work is easier, reality is often different. Companies distribute their offices and partners globally and people running projects need to find ways to collaborate remotely. With the advent of new technology, this movement will only grow.

We as authors have experienced the challenges of distribution. Cultural, time zone and geographical distance, make collaboration more challenging.

Teams need to form a certain team spirit or team culture. Why are they a team? What's important to them (values)? What are they working on? The team spirit is influenced by distance between team
members. If they’re apart, they have fewer chances for live meetings. They also experience time differences, making it a challenge to meet up online. Cultural differences influence the way they collaborate, often resulting in miscommunication and misalignment.

There is a product or product portfolio. Different teams may be working on different products or on one product. The more distributed the teams, the stronger the need for strong governance. Underlying the products is architecture. Roles like product owner, portfolio manager, scrum master are assigned based on a delicate balance of skill, knowledge and location. Organizations need to decide where to form what roles in order to achieve company goals.

Our backgrounds are in IT. The IT industry is at the forefront of exploring how to work with distributed teams. The past decade, people found that the agile manifesto helps in developing better software. Agile also helps people communicate and collaborate better. Although the manifesto describes that ‘face to face communication is better’ (which implies co-location), there are many reasons Agile works well in distributed teams too.

In this book, we assume you already know the basics of Agile. If not, it helps to read some other books or blogs about Agile. We also assume you (will) face challenges in distributed work and are looking for solutions. Our book provides solutions that are ‘framework agnostic’, meaning we don’t favor Scrum or LESS or SAFe or Kanban over another framework. We believe the power of Agile is in shaping a different culture, mindset and way of working. That’s the basis for making distributed teams work better. Having said that, some of the practices shared by people in the field (described later) may be biased towards a certain framework.

The book you are reading is the ‘minimum viable book’ (the book version of lean startup’s minimum viable product). As true agilists, we believe things evolve incrementally. That includes this book. If you have feedback on the existing content, we’ll incorporate it. If you want to share practices, please send them to hugo@ekipa.co or contact Hugo through whatsapp +6287786693690; after reviewing them, we’d be happy to include it in our next book increment.

About the Authors

John Okoro is the creator of Auspicious Agile and he has founded Agile services practices for Rally Software in Asia and for a US management consultancy. With nearly a decade using Agile methods, John is an expert at using Agile practices and methods at Enterprise scale and
in large and distributed organisations. John is a frequent speaker at Agile and industry conferences and an InfoQ contributor on DevOps. John has consulted in the telecommunications, entertainment, real estate, information services, financial services and professional services industries for numerous Fortune 500 companies including Disney and Accenture. He is experienced with start-ups, entrepreneurial ventures and working with US government clients. John also teaches on Agile Scaling at National University of Singapore (NUS) and for the Singapore Skills Future initiative.

Savita Pahuja an agile coach, trainer, and speaker. She helps organizations in their agile transformation journey by coaching, consulting, mentoring and training. She has expertise in Scrum, Lean, Kanban and other visual discovery methods. She started her journey in IT industry as a developer and then she moved into Agile world as a consultant and trainer. Since then she has been working with different clients for Agile adoption/transformation and giving trainings on Scrum and Kanban.

Hugo Messer has been building and managing teams around the world for over 10 years. His passion is to enable people that are spread across cultures, geography and time zones to cooperate. Whether it’s offshoring or nearshoring, he knows what it takes to make a global collaboration work. He’s the owner of Bridge Global, a global software powerhouse and Ekipa, an Agile consultancy in Indonesia and Singapore. Hugo has written 6 books about managing remote teams.

What is Distributed?

Let’s first define what a distributed team is. From our perspective, as soon as the people you closely collaborate with are not sitting in the same office building, you’re distributed.
**CO-LOCATED**

* Every team has its members in the same room

**DISTRIBUTED**

* Different teams sit on different locations *(usually in different countries)*

**DISPERSED**

* Everyone works from different location
In this book, we don’t deal with the challenges of co-located teams. Of course, some of the challenges we describe, also exist in collocated teams. However, the challenges are magnified in distributed teams. The distributed setup above depicts cross functional, collocated teams, more than 60 meters apart. The siloed setup means functional teams (e.g. a team of developers or a team of testers) are collocated, while other teams are on other locations. The dispersed setup has all or most team members working from different locations. Everyone is remote in that case. Our book deals with distributed, dispersed and silo’d setups.

Why This Framework?

We started developing this framework, because we personally struggled to make our distributed teams work. And we see this all around us. In the Agile world of today, there are many frameworks that help on the team level (Scrum, Kanban) or on the organizational level (SAFe, LeSS). All of these frameworks touch on the topic of distribution, but they don’t offer specific solutions.

Our framework is based on the understanding that there is not one path that distributed organizations can follow for success. It’s more like juggling balls in the air: you throw one up and another falls down; hopefully they don’t crash on the ground, but sometimes they do. Making distributed teams work is about identifying challenges, experimenting with solutions and keep iterating.

The key is to learn from other people. Therefore, we have decided to outsource a big part of the wisdom in our framework. Many of the practices are all sourced from practitioners. They describe what worked for them in their context. You can experiment with their solutions and see what works for you.

Overview of the Framework

Our framework consists of 6 bubbles that cover all areas that have an impact on distributed organizations.
The bubbles our framework covers are:

1. Culture
2. Communication
3. Leadership
4. Teams and tools
5. Organization
6. Product

Within each of the bubbles, we have described 3 things:

Questions

As people get to work every day, we slip into ‘business as usual’. Although frustrations about (distributed) work pop up, we’re often not aware of the sources of our problems. To help create this awareness, we’ve developed a simple set of questions within each bubble. These can be used by organizations to assess their current stage of distributed agile.

Virtues

Bridging geography and culture effectively depends on human behavior. Tools or processes can’t replace that. We believe that driving behavior depends on personal, company and cultural values. We have developed a set of virtues to stimulate behavior that fosters distributed collaboration. In each bubble, the virtues describe what people can do to make things better.

As leaders, we can stimulate those virtues in our teams. As individuals, we can stimulate these virtues in ourselves and our colleagues.

Practices

We learn from people that have solved the challenges we are facing. A book developed by one guru contains the experience and knowledge of that person. Wisdom shared by 100s of people contains a broader knowledge base. Besides, the domain of Agile, technology and distributed work is changing very fast. To help you learn faster and keep up with the pace of the world, we gather practices from experts globally. The practices are ‘open sourced’. You can contribute and consume. The practices in this book are a selection of the practices we’ve collected on our online platform.
Communication

Introduction

Communicating within distributed teams is challenging for most people. Communicating with people in your own country with whom you share a language, culture, and many other similarities is already challenging. With people from another country, time zone, culture, and language, it is even more challenging. With any distributed project that does not proceed as expected, people often name communication as the main reason.

Remote communication can be both enjoyable and frustrating. I still love opening my computer, starting Skype, and talking with my colleagues from India, Indonesia, Ukraine, or Sweden. I find it exciting to share with my own development team in India the many things I have learned from talking with people who work in Latvia, Ukraine, and India. I enjoy having a Monday morning meeting with team members from three locations and deciding our strategy for the week.

With different nationalities to complete projects is highly rewarding. At the same time, I have also been misunderstood as well as not understood what is happening on ‘the other side’. If one of my managers in India is unsatisfied, and I need to figure out what is going on, it is more difficult to resolve through Skype than it would be locally. Her perspective is also different from mine, so it takes skill and practice to understand. It is frustrating when you thought you clearly communicated your ideas for a certain function or design only to receive something that is entirely different from what you had in mind 2 weeks later.

Through practice, we learn how to communicate. This was true when we were kids, and it is still true as adults when we find ourselves in a new team with people from different locations who are using tools instead of face-to-face communication. If you focus on the frustrating part above, it becomes difficult. However, if you view it as enjoyable, you will find ways to make it work. If you are a strong communicator and/or lucky, and you have the right team that has remote work experience, communication may even work as if the team is in your local office.
What Do We Mean by Communication?

I think everything people do in business is some form of communication. We continually communicate in different forms (e.g., writing, speaking), through different media (e.g., email, Skype, Slack, Whatsapp Messenger), and on different levels (e.g., chit chat, operational, reflective, strategic). Communication is influenced by many subtle factors such as the participants’ cultures and accents as well as whether they are introverted or extroverted. Because communication covers such a wide spectrum with so many variables, focusing on communication per se is not the solution to making distributed collaboration work. We need to look at other aspects.

How Does Communicating with a Distributed Team Differ from Communicating with a Local Team?

In many ways, it is not different at all, and in other ways, it is very different. On an individual level, members of distributed teams lack facetime in the office. Face time with your colleagues allows you the opportunity to bond and chit chat about things that matter to you. Because remote team members lack facetime, we do not have the same chance to build strong bonds as those who see each other regularly, resulting in a weaker understanding of one another’s motives. Even if we use video conferencing to ‘see’ each other, we miss the emotional cues.

At the project level, we miss chatting at the coffee machine about the task we are working on together. We miss the brainstorming sessions about the product we are creating and the clients we are serving. This lack of face-to-face communication has a strong impact on the level of understanding that remote team members have about the product, its purpose, and the clients who use it.

At an organizational level, we miss the inspiration gained from talking with the company CEO over a beer at Friday night gatherings. We miss the way the core values of the company influence the behavior of the people working within the onshore office.

To bridge these divides, we need to give more thought to remote communication. When we communicate with people in our office who are from the same culture, we do not experience (high) conversational barriers. However, when we speak with remote colleagues who are from
another country, we have to think more deeply about the forms, media, and levels of communication we choose. Let us look more closely at how we can go about this.

Questions

To assess the current state of communication within your distributed organization, the following questions are helpful:

- Do we have a communication rhythm at different levels of the organization (strategic, operational, team)?
- What agenda do we follow in our meetings?
- How do we make (work) progress transparent?
- What type of communication is supported by what tool?
- Do we have empathic facilitators?
- (How) do we substitute water cooler chat?

Virtues

- Align: create a communication rhythm at all levels
- Match communication modes with the right tools
- Facilitate the discussions
- Inclusion
- Transparency
- Openness

In order to make an organization agile, we need buy in and support at different levels, especially leadership and management. To make a distributed organization work smoothly, such alignment is even more important. On the team level, agile has built in meeting rhythms. It helps to add a communication rhythm at the managerial and leadership level; a quarterly strategic meeting, a monthly product ownership meeting are some examples. Alignment is key.

There is an abundance of tools for communication nowadays. Many people still rely on traditional media like email and phone calls and those are not always the most effective tools. Big enterprises also restrict people from using modern tools. We believe it's crucial to open up the possibility of using tools that can improve communication. Teams can self-select their tools.
Or organizations can make metrics to match certain types of communication with the best tools available.

A strong facilitator helps create meaningful discussions. Distributed team members are often uncomfortable talking through video conferencing, in a different language with people they have never met. An effective team has equal 'talk-time' for every team member. Effective teams have a clear agenda and timebox for their meetings. A facilitator can ensure this happens.

Including everyone affected by a certain discussion topic in a meeting helps spread the right knowledge. As many remote people miss watercooler chat and customer interaction, it is paramount to include them in all important communication. Transparency being one of the key agile values, in distributed teams, we need to enable everybody to see what is going on. Sharing product vision boards, strategic plans, product backlogs, help spread important information across the distributed organization. Openness empowers people to help each other solve problems and create a better understanding between team members. Sharing everything that's important with your peers fosters effective collaboration.
Culture

Most distributed teams consist of people from different cultures, working from their home country. While working remotely is in itself a challenge, cultural differences influence collaboration underneath the surface. As human beings, we believe we can work with anyone from any culture. But after some time, we realize we’re not understanding each other properly. Culture influences communication through different beliefs about openness, responsibility, hierarchy and work in general.

As the title of the article implies, we believe that teams need to 'manage' cultural differences. It's not something that can or should be 'overcome'. And it's also something that can be seen as positive, as bringing additional viewpoints to a team.

What is Culture?

It's not always clear what we mean by 'culture'. It can refer to habits within a group of people from a certain country, company or any other level.

Within a country, people from certain behaviors; there are values and norms that shape how we act; we communicate in different ways. But often, we are not aware of this, and we’re not able to recognize other people's behavior within the context of their own culture. While the country culture influences collaboration, the solutions to intercultural challenges lie on the company and team level.

How Culture Influences Collaboration in Distributed Teams

From our experience at the team level, culture influences the way we collaborate in various ways:
If our teammates have a local mindset, they might prefer to work with people in their own city, speaking their own language. What distributed teams need, however, is a global mindset, where people are interested in getting to know the others and learning about the cultures involved. Having too many people with a local mindset on your distributed team runs the risk of creating an 'us versus them' mentality. 'We over here' flock together and we know how stuff works. 'Those people over there' make all the mistakes and they don’t understand what we need. This type of attitude often derails the whole team.

**Task Versus Relationship Orientation:**

People in the West (especially in the U.S.) are often task and goal oriented. They want to get their stuff done. People in the U.S., for example, make quick decisions on hiring a certain vendor. If the vendor has what they need, they decide overnight to give him the project. If he screws up, they as easily pull the project back. In Asia, people are very social and believe in building long term relationships. They want to know whom they are going to work with, and they would rather spend several months fostering the relationship before granting a project to a new vendor. But within Asia, there are vast differences. Hugo has recently moved to Indonesia and noticed that people in Jakarta move very fast. After a first talk, proposals are asked and confirmations follow within days.
Europe is somewhat in between (with vast differences between the countries within Europe!).

**Level of Openness:**

Another big influencer is the level of openness. Do I keep my opinions to myself or will I voice them easily? Here we again have a west-east divide. Dutch are very open, however, people in Asia tend to be less open, especially when authority is involved, i.e., “I’m not going to contradict my boss or project manager”. That may be seen as disrespectful. If the boss is in the West and I’m in the East, then my Western boss in turn will keep asking me to be more open or proactive. And I might get confused, because I’m not used to being allowed or even stimulated to voice my ideas. If my boss tells me “This is the way to do it,” I’d rather do that exactly, even if I think it’s a crazy idea. This behavioral difference impacts most of the agile ceremonies. For example, in sprint planning if a product owner asks ‘Can you take more user stories?’, regardless of the possibility, people in some Asian cultures tend to say "Yes" always, which defeats the whole purpose of doing planning. Similarly, in retrospectives, people hesitate to share real challenges and problems (e.g. because a superior might get offended by it).

**Tendency to Always Say "Yes":**

An interesting case, often discussed in global organisations is Indian people always saying ‘yes’. [Ged Roberts](https://www.tcs.com/) of TCS wrote an article in one of Hugo’s ebooks titled ‘Cultural Differences or How I Managed to Learn to Work with Both Dutch and Indians Without Losing My Hair’. The following excerpt describes the ‘yes’ well:

When I first started working for an Indian company I was given a very sound piece of advice. I was told the following, Ged, there are three ways an Indian person will say “yes” when asked whether they can do something and the response will have one of the following three meanings:

1. Yes I can do that,
2. Yes I can do that (it will take me nineteen hours per day but I can do that) and
3. Yes I can do that (actually I can’t do that, but you are the customer and I cannot say no to a customer)

If you wish to be successful in any relationship with an Indian company, your challenge is to understand which version of "yes" you have just heard. When we probe deeper mainly into the version #3 of “yes” we find a number of cultural items at play.
The first aspect is the extreme levels of customer focus and customer centricity which plays within the Indian psyche. Concepts like 'the customer is always right' and 'the customer pays our wages' (management just handles the money) are prevalent throughout the culture. The second aspect is that there is an assumption that someone will always say yes, consequently if you want the business or you want to maintain the relationship then saying yes ensures that that relationship stays with you. Although there is the worry that the commitment is given without any thoughts to the consequences, this relentless level of customer focus has lead to some quite amazing achievements. Consequently, many times the version that you hear is not version #3 or version #1, but version #2.

This kind of behavior hampers the collaboration and trust between distributed teams. It also fades out the transparency within a team that is the core of agile teams.

**How to Work with the Cultural Differences**

The above shows that culture is relevant. It impacts organizations, teams and outcomes. To work with the influence of culture, we've developed a set of questions organizations can ask. These questions help create awareness of the impact of culture. It also helps identify what possible pain points exist. We've also defined a set of 'virtues': behaviors that help organizations manage cultural differences in distributed teams. And we've described some practices that can be used to address culture.

**Questions**

The below questions are a good starting point for cultural awareness. They are best used in a facilitated team session with people from the respective cultures. They can also be shared online as a survey or in a trello board (columns with questions, tickets with answers and discussions). They are meant to be 'played with'.

- Are we experiencing impact from cultural differences?
- Do we have an 'us versus them' paradigm?
- How do we deal with differences?
- What will we do to get the differences to the surface?
- How comfortable is each culture with being open, sharing matters of mind and heart?
- What's the impact of cultural differences if we're collocated versus distributed?
- How much hierarchy do we have in our organization?
• How does each culture perceive hierarchy?
• How much 'self organisation' do we expect?
• What can we do to get everyone on the same level of 'self organization'?
• To what degree does language have impact?
• Does everyone have the same understanding of saying 'no'?

Virtues

To effectively work in a multi cultural distributed team, there's a handful of behaviors that help people work with cultural differences:

• Empathy: accept differences, 'jam' with them
• Awareness: becoming aware of the differences
• Openness: sharing what's on your mind
• Trust people more than process
• Transparency

**Awareness** of cultural differences is the starting point to 'acceptance'. Once we become aware that certain behaviors of other people originate from their cultural background, we generate understanding. With this understanding, we can move on to accept the differences as a fact of our situation. Based on this acceptance, we can find ways to organize work 'around' them.

**Empathy** means 'putting yourself in the shoes of another person'. People with high degrees of empathy tend to be good listeners. They are strong at experiencing and feeling what someone else experiences and feels. This heightened understanding helps people to collaborate better across cultures.

Complete **openness** (or honesty) means: I have an image about something (an object, a situation) in my mind. If I am 100% open, I will share that image with you as it appears in my mind. I'll share any information I have in my mind with you; I will not change or hold back anything that matters in this situation. Openness helps people understand each other. It helps teams to inspect what's going on and adapt in order to achieve the outcomes they're after.

**Transparency** is the key to build trust among team members. Being distributed it is even more important to be transparent and share achievements as well as challenges and co-create the
solutions. If some discussions and acts of any team member do not resonate with your culture, be transparent and share your perspective.

We create processes to bridge cultural gaps, however, trust is more important to make processes suit to your work style, hence, trusting people has higher value than following processes.