

Skillbook

How to Set Up a Virtual Team

Team Management
Skills



Mindtools

How to Set Up a Virtual Team

Skillbook

This Skillbook is published by Mind Tools Ltd.
21 Young Street, Edinburgh, Scotland, EH2 4HU.

Copyright © Mind Tools Ltd, 2025.
All rights reserved.

Version 4.0.

This Skillbook is protected by international copyright law.
You may use it only if you are a Mindtools member or have
received it under corporate license.

If you have any queries, please contact us at
mtecustomerservices@mindtools.com.

Contents

1.	Introduction	1
2.	Virtual Recruitment	2
3.	Virtual Onboarding	6
4.	Setting Ground Rules for Your Virtual Team	13
5.	Choosing the Right Tech	18
6.	Key Points	21

1. Introduction

Remote working is nothing new. And yet many businesses have yet to adopt this way of working beyond more than a few roles.

Everything changed during the 2020 global coronavirus pandemic, which forced many businesses to shut offices and send their employees home to work.

Remote working is useful for a number of reasons. It allows organizations to:

- Continue working during crisis situations.
- Take advantage of expertise and talent based overseas.
- Offer 24-hour coverage by employing people in different time zones.
- Reduce office overheads.

Remote working also offers several benefits to employees. For example, it enables them to:

- Have greater autonomy over how they work and when they work.
- Have more flexibility to attend to their other responsibilities, such as carer duties.
- Save time by reducing hours spent commuting.
- Work from anywhere they choose.
- Work in a setup that is more comfortable or tailored to specific physical difficulties.

Nonetheless, setting up a virtual team and making that leap from an office setting to remote working is not without its challenges. How do you recruit and onboard new people when you can't meet them face-to-face? How do you ensure that everyone stays productive, connected and engaged?

This **Skillbook** will help to guide you through the difficulties that you'll face when setting up a virtual team. You'll learn how to:

- Recruit and onboard new team members virtually.
- Set out some ground rules for your virtual team by developing a Virtual Team Charter.
- Select and use technology that suits your team's specific needs.

2. Virtual Recruitment

Planning and preparation are key to successful virtual recruitment.

Many global businesses that need to hire people overseas already use virtual recruitment and onboarding strategies to grow their teams. These include hosting video interviews, using online skills-assessment platforms, and training new employees using virtual technology.

Virtual recruitment can save you time and money, especially if you've been inundated with hundreds of résumés. It can also help you to access a much larger pool of talent – overseas candidates, for instance, or people with physical disabilities, who may struggle to attend a face-to-face interview.

In this chapter, we'll explore how to recruit and onboard new employees virtually.

Video Interviews

In many ways, your virtual recruitment strategy will be the same as your normal recruitment strategy. The vast majority of employers will use online tools, such as LinkedIn or a job website, to advertise jobs, and résumés can be submitted through these or via email.

The main thing that will change is how you set up and manage the interview process. This will require much more planning than face-to-face interviews.

Instead, you'll need to rely on video interviews. These offer a lot of benefits (lack of travel, and greater flexibility, for instance). But there are downsides, too. For example, it may impair the performance of candidates, particularly if they are camera shy. It's also much harder to build rapport and to read body language in a video interview, compared to a face-to-face interview.



Action:

Think about a time when you hosted a virtual interview. Write down four or five difficulties that you faced when organizing and hosting it. If you haven't yet hosted a virtual interview, write down some of the potential difficulties that you think it could pose.

Next, write down how you could fix these issues. Could you use different video-calling software, for instance? Or do you need to prepare a clearer agenda and instructions for the interview well in advance so that everyone understands the format?

Difficulties	Solutions
1.	
2.	
3.	
4.	
5.	

There are numerous practicalities to consider when prepping for a video interview. What will you do if your internet connection fails? How will the interviewee demonstrate their knowledge if they need to bring or show evidence? What if they don't use the same online virtual meeting software that you do?

So, let's look at some simple steps you can take to make your video interview run as smoothly as possible.

1. Get Organized

Make sure that everyone has everything that they'll need for the interview well in advance. Does the candidate have access to a good WiFi signal, for instance? Will they need to download specific virtual meeting software, such as Teams or Zoom?

Send the candidate clear instructions on how to access and use the virtual meeting software that you've chosen. And be sure that you're familiar with its functions, too!

2. Set the Stage

Choose a quiet place with a suitable backdrop, and position your webcam at eye level, so that your head and shoulders are shown squarely on the screen. Dress as you would for a face-to-face interview.

Make sure that there's enough light in the room so that your interviewee is able to see you clearly. But avoid direct sunlight as this can be distracting and cause glare.

3. Set Clear Expectations

Virtual meetings can become confused, particularly if your interview includes a panel of people. So, outline the meeting agenda right at the start and make sure that everyone gets a chance to introduce themselves.

It can also be helpful to set out some meeting guidelines for everyone to follow. For example, will there be an appointed person to ask questions? Will someone else be taking notes? Will different people be leading different parts of the interview?

Check that you are able to see and hear each other clearly as well. If the connection is poor, offer to disconnect and start again.

4. Listen Actively and Don't Rush

Before the interview starts, shut down any unnecessary applications that you have open and turn your phone to silent to avoid getting distracted.

Give your interviewee your full attention. Listen actively and show that you're engaged by nodding, or interjecting with words such as, "Right," "OK" or "I see."

Allow for a short time lag between your questions and the interviewee's answers. Give them time to respond, and resist the urge to fill in any awkward silences. They may just need some extra time to consider their response, or there could be a delay in your connection.

Ease the interview along by using clear prompts. For example, say things like "Over to you" when it's someone else's turn to talk.

5. Use Online Skills Tests and Assessments

Face-to-face interviews often include aptitude tests, problem-solving exercises or psychometric tests for candidates to carry out. This can help recruiters to learn more about them, and can provide some reliable evidence of their skills and competencies.

Consider how you can adapt such tests to administer them remotely, and whether they'll still yield reliable results. Is it possible to grant external access to your testing platforms? Do you need the candidate to complete the tests well in advance so that you can discuss the results in the interview? Would you need to supervise them if so? Could you design new activities more suited to an online environment?

6. Be Secure

Ensure that you are sharing information securely with one another. This means adhering to the normal data protection rules regarding your interviewees' personal information.

Also, use passwords for your video meetings and choose a platform that provides end-to-end encryption. This will ensure that any information shared during the interview stays secure.

Once you've finished your virtual interview, the rest of your recruitment process will likely continue as normal – discussing which candidates were the best, for example, setting up a second round of interviews, making your final selection, and sending out a formal job offer.

The next step – should the candidate accept your offer – is to onboard them. But how do you do this when face-to-face meetings aren't an option? How will you facilitate training, for example? How will you make them feel part of the team? And, how can you ensure that they stay motivated and engaged when checking in regularly isn't as simple as walking over to their desk?

In the next chapter, we'll look at how you can successfully onboard new recruits virtually.

3. Virtual Onboarding

The period between making an offer to a candidate and their first day on the job is particularly important when you are virtually onboarding them.

They may think that you've forgotten about them if they don't hear from you for a while. So make sure that you or someone from HR contacts them weekly to check in and make sure that they have everything they need before their start date.

In this chapter, we'll look at some other things you can do to welcome your new virtual teammate into your organization, and to help them to work effectively right from day one.

Put the Prep Work In

First – get organized! There's a lot that you'll need to sort out for your new employee, so be sure to start prepping early. Don't leave it until their first day.

Create a checklist of the things that they'll need. What hardware and software will they require, for example? (See the chapter on Choosing the Right Tech on [page 18](#) for more on this.) What e-learning resources, policies and procedures will they need?



Action:

Think about the things that you'll need to prepare for your new employee before their start date. This will likely need to include:

- Hardware (e.g. laptops, headsets, keyboard, mouse, monitor).
- Software (e.g. VPN access, systems, apps and login details).
- Welcome pack (e.g. welcome letter, a gift, company swag, employee handbooks).
- E-learning resources, procedure documents and guidelines.

List these in the boxes on the following page. Then, write down who (if anybody) you'll need to contact to supply them, and how you will go about providing them to your new employee (e.g. post or email).

	What Will New Employees Need?	Who Will Supply These?	How Will These Items Be Supplied?
Hardware			
Software and Logins			
Welcome Pack Materials			
E-Learning Resources, Procedure Documents and Guidebooks			
Other Resources and Materials			



Tip:

Create a bank of in-house e-learning resources that new recruits can access easily online. You could, for example, record training sessions, or include recordings of webinars and product demonstrations. This would also be a good place to store procedure documents, and style and branding guidelines.

Plan Their First Week

Your prep work should also include a detailed plan of your new hire's first week. During this time, it's important that they get to know more about the company culture, its vision, values, and mission.

This, of course, means setting up lots of meetings. These can feel overwhelming at times, but they're necessary to ensure that new hires feel welcome, informed and connected. If possible, set up meetings with the following people during their first week:

- **You (or their line manager)** – Schedule daily one-on-one meetings with your new employee, as it will be your responsibility to set out their objectives, organize training, help them to fit in, and ensure that they are staying on track with their tasks.
- **Their teammates** – Organize one-on-one meetings with each member of the team. This will help your new employee to feel part of it, and will enable them to understand more about the tasks and objectives that each team member is responsible for.
- **The CEO or head of department** – Organize a meeting with a senior business leader during the employee's first week to discuss the health of the business, its mission and values, and its current strategy. This will help them to understand more about the company culture, its prospects and its future objectives.

Beyond the first week, think about additional meetings that might be helpful to your new team member. These could include meetings with people from different departments and other senior leaders from across the business.

Doing this will enable them to build up their own internal network of valuable connections and will allow them to learn more about the organization and its culture.

This can often lead to a busy schedule. So get in touch with them regularly using online chat tools, such as Teams or Slack, to check how they are coping. Make sure that they spend some time away from their screen – something people often forget to do when working remotely. And block out some time for lunch in their calendars every day so that they get some space to relax and reflect on the things that they've learned so far.



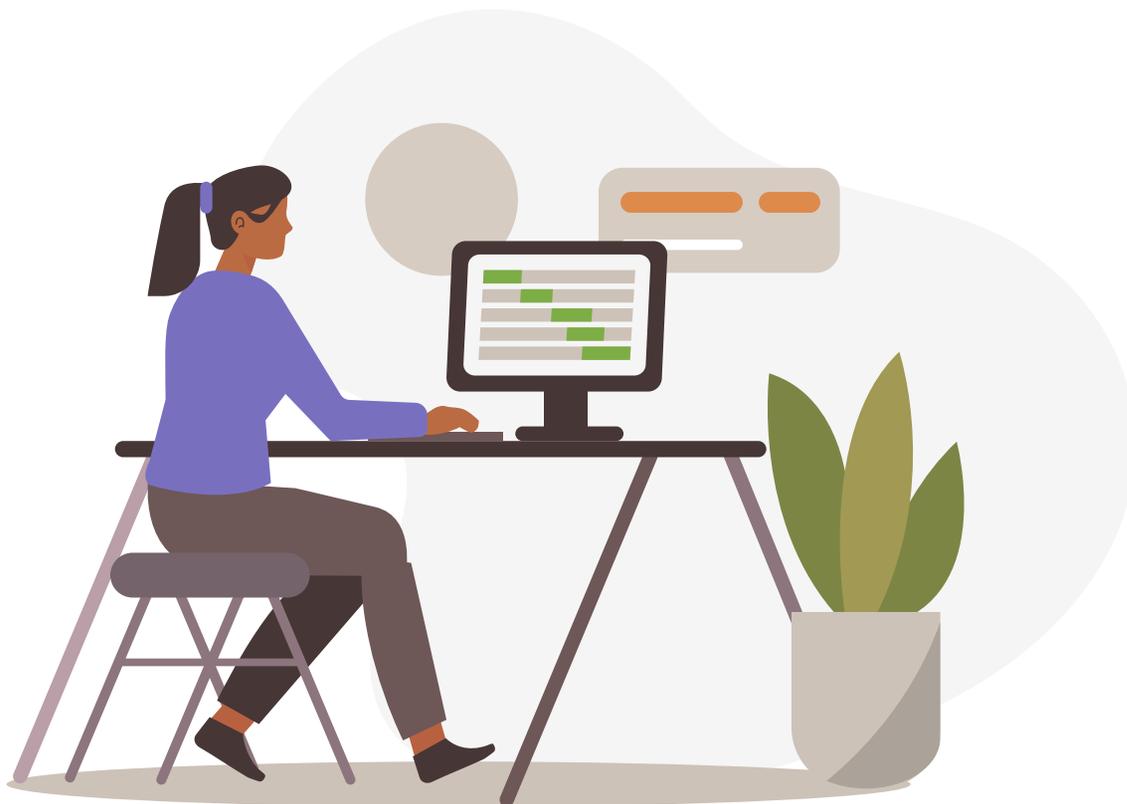
Tip:

Virtual ice breakers and virtual team-building exercises can also be a great way to build rapport, reduce isolation and loneliness, improve communication between team members, and help them to better understand each other's strengths and weaknesses.



Action:

Use the planner on page 10 to plan your new employee's first week. Write down the activities that they will need to complete (these may include meetings, team-building exercises, or role-specific tasks), when they should do them, and who their point of contact is for each activity.



	Activities	Time	Point of Contact
Day 1			
Day 2			
Day 3			
Day 4			
Day 5			

Consider setting your new team member a little challenge to keep them engaged during their first week. This should be designed to help them to learn more about their role, their new team and the organization. It could take the form of a “treasure hunt” where they need to find different pieces of information relating to the organization.

Alternatively, why not set them a list of 10 Top Challenges that they need to finish by the end of the first week? These could include talking to each member of their new team, writing up a summary of the key products that your company produces, or discovering what the organization’s mission and key values are.



Action:

Write down 10 challenges for your new employee to complete by the end of their first week. Remember that they are working virtually, so these need to be tasks that they can complete from home.

	Tasks to Complete by the End of Week One:
Challenge #1	
Challenge #2	
Challenge #3	
Challenge #4	
Challenge #5	
Challenge #6	
Challenge #7	
Challenge #8	
Challenge #9	
Challenge #10	

Partner Them With a Virtual Buddy or Mentor

Assign your new recruit an online work buddy or mentor. This should be someone else from the team who they will be working closely with. They should be able to connect with this person regularly, so that they can work through any issues that may crop up during their first few weeks on the job.

Having informal coffee breaks with their virtual buddy can also provide good opportunities for new employees to ask questions about the organization and the job role in a more relaxed setting. And it can help them to feel part of the team.

4. Setting Ground Rules for Your Virtual Team

Now that you have your virtual team in place, you need to give it a clear direction and clear objectives.

Gone are the “watercooler moments” or quick office catch-ups and stand-ups. This means that good communication is vital if you want your team to stay productive, engaged and on track.

So, in this chapter we’ll look at some practical steps for setting up a successful virtual team. This will include:

- Creating a Team Charter that defines your team goals and outlines how your team will operate.
- Setting up some Virtual Team Guidelines which clarify how you will communicate with each other and log your progress.

Team Charters

In a traditional, office-based team, where members meet face-to-face regularly, it’s easy to communicate and keep up-to-date on how everyone is progressing. But, with a virtual team, the risk of poor engagement is higher. So, it’s essential that you define why your team exists. What’s its main purpose? How does each team member’s work contribute to the success of the team and to the organization as a whole?

Each member must find the business challenge compelling, and should be energized by what the team needs to accomplish. This can be hard in a virtual team. There are no encouraging smiles in the hallway, or impromptu “How’s it going?” conversations that are so easy to do in an office setting. Instead, each person needs to find their own inner drive and determination if they want to continue to work productively and meet their goals.

A great way to keep everyone on track is to use a Team Charter. This is a document you can use to explain your team’s purpose, as well as how it will work and what it needs to do.

Essentially, a Team Charter works as a “road map” which team members can refer to to check that they are heading in the right direction. It’s usually drawn up when a team is first formed. But it can also be useful if a team is in trouble and needs to regain or clarify its direction.

A team charter usually includes the following:

- **Context** – this should give some background information on **why** your team was formed. Was it to solve a particular problem? Or to deal with longer-term issues and day-to-day tasks? Why are these important? And how will they help the organization to achieve its broader objectives?
- **Mission and objectives** – summarize your team’s main goal in one sentence. This is a key part of your Team Charter. By defining a clear mission, your team knows what it needs to achieve. Without this, it can be easy for people to get “off track” and start pursuing their own agendas, irrespective of your team’s overarching goals.
- **Composition and roles** – to be successful, you need to have the right people on your team with the right skills. Look at your team objectives and try to match team members to specific roles. Think about how each person will help to achieve these objectives. Does anyone require training? Are there any skills gaps? Who will be team leader? Who is responsible for what duties and outcomes? Who is the liaison between your team and other stakeholders?
- **Authority and empowerment** – now that you have clearly set out roles and know who is responsible for what, look at what team members can and can’t do to achieve the mission. How much time should they allocate to the team mission? What priorities do team activities have in relation to other responsibilities? What budget is available? Do you need to recruit new people? What can the team do, what can it not do, and what does it need prior approval to do?
- **Resources and support** – in this section, explain what resources and support are available to your team. For example, budget, time, equipment, and people. Also detail the training and support available to team members here.
- **Operations** – how will the team operate on a day-to-day basis? This can be a detailed plan or a few bullet points.
- **Negotiation and agreement** – a good Team Charter should emerge organically and include input from all parties involved, whether that be team leaders, team members or other external stakeholders. Finally, you need to ensure everyone’s buy-in. This means getting everyone in the team to sign off on the Team Charter. This is a symbolic gesture that ensures everyone’s commitment to the mission and objectives. It also helps to create accountability to one another and to the organization.



Action:

Develop a Team Charter for your team. Fill in the boxes on page 16 and include the following:

- Context.
- Mission and objectives.
- Composition and roles .
- Authority and empowerment.
- Resources and support.
- Operations.

Get input from your team members about what should be included. Ask everyone to sign off on it by adding their names to the bottom of the Charter, to reflect that they are happy and committed to the mission and goals outlined.

Our Team Charter

Team Charter	
Context:	
Mission and Objectives:	
Composition and Role:	
Authority and Empowerment:	
Resources and Support:	
Operations:	
Signed By:	

Remember that a virtual Team Charter needs to go a step farther than one designed for an office-based team. This is because people will be expected to work with a higher level of initiative in order to achieve the team objectives, and to communicate and collaborate.

So, alongside your Charter it might also be a good idea to set up some “Virtual Team Ground Rules.” For example:

- How quickly will people be expected to answer direct messages or emails?
- Will everyone be available during the same core hours or will some people only be available at certain times?
- Will you use video chat in every meeting or just in some?
- How will people log their progress? Will you use a project-management app? Or a spreadsheet?
- How will you share files and collaborate?

It’s important to emphasize these rules with your virtual team because you won’t have a chance to talk to them in casual chats or impromptu meetings.



Action:

Think of three specific rules or norms that your virtual team uses (or should use).

Examples could include answering emails within a set amount of time; ensuring that statuses on chat apps are kept updated throughout the day; how often people need to log their progress and tick off tasks; or whether or not you’ll use video in your virtual meetings.

Rule #1:
Rule #2:
Rule #3:

5. Choosing the Right Tech

 Online tools and tech will be key in enabling your people to communicate, collaborate and stay productive while working from home.

Luckily we live in a day and age where there's an app to solve every problem imaginable. So, in this chapter we'll look at some of the online tools that can help your team to stay on track when they work remotely.

It's vital that you choose the software that's right for you and your team. In general, you'll need to consider the following four types of tech:

- **Online communication tools:** these are essential for helping people to stay connected and informed, and to reduce problems relating to isolation or loneliness. Popular apps include Slack, Microsoft Teams, Zoom, Google Meet, and Workplace From Meta (Facebook).
- **Online collaboration tools:** these include apps that drive creativity and collaboration, and allow you and your team to brainstorm ideas. For instance, Microsoft Whiteboard, Jamboard, Mural, or Miro.
- **File-sharing tools:** these include online drives that enable you to save and retrieve files, collaborate on documents, and share information. This will also be where you store essential business information, such as procedures, guidelines, contact lists, and training guides. The two main types of file-sharing tools to consider using here are Microsoft Sharepoint and Google Drive.
- **Productivity tools:** staying on track with tasks and projects can be challenging even when you're working in the office. So it can be helpful to sign up to some productivity tools that will enable your people to delegate tasks, to set deadlines, and to log their progress. Productivity apps you might want to consider include Trello, Asana, Basecamp, Salesforce, and Microsoft Project.

Before you sign up to a new online tool, ask yourself the following questions:

- How easy is it to use and sign up to? Will an administrator be required to maintain the user database and add new logins?
- Will training be required if you decide to sign up to it?
- Do you need to talk to your IT department to make sure that the software is secure and won't affect other apps or software that your business uses?
- How expensive is it? Do you have the budget available if you were to use it in your team? Or in the wider organization?
- What kind of package will you need to sign up to? Small Business or Enterprise, for example?
- What purpose will it serve? Does it suit your business objectives?
- Do you already use a similar tool? Or do other teams use a similar tool that you could gain access to?
- How secure is it?
- Will clients be able to use it, if necessary?



Action:

Write down what tools you want to use against each purpose listed in the table on the following page (for example, communication tools, collaboration tools, file-sharing tools, and productivity tools). You may want to pick a few choices for each.

Remember to take into consideration the questions that we've covered above. Some research will likely be required here to investigate whether the app is really the right fit for you and your team.

Once you've listed your favorite choices, jot down some key details, including price, number of users, and training requirements. Also, write down the specifics of how it will help your team and organization. For instance, will you use it to host your team meetings or your one-on-ones, or both?

Doing this will help you to make a well-informed decision when you come to make your final choice.

	Name of Tool	Price	Number of Users	Training Requirements	What Will You Use it For?
Online Communication Tools					
Online Collaboration Tools					
File-Sharing Tools					
Productivity and Project-Management Tools					

You'll likely find that your team will use a variety of tools for different purposes. Sometimes this can get confusing. So it's a good idea to clearly outline to your team when and how to use each app. For instance, you may use Slack for instant messaging and general communication, but use a more powerful online meeting tool, such as Microsoft Teams, for hosting virtual meetings.

6. Key Points

Setting up a virtual team can be challenging, but it can also provide a number of benefits both to your team members and the wider organization. It enables people to work more autonomously, for example, cuts down on commuting time, and enables people to work anytime and from anywhere.

From an organization's perspective, virtual or remote working means that they can continue to operate even in crisis situations. It can also help businesses to cut down their operating costs, broaden their talent pool, and gain 24/7 coverage by employing people working out of different time zones.

Whatever the case, virtual working is here to stay. So it's essential that businesses know how to set up new and existing team members for remote working.

This requires a lot of planning and prep work, as well as excellent communication and, of course, access to the right hardware and software. But if you put the time and effort in, you'll be helping your people to stay connected, engaged and productive wherever they might be working from.