

Processes and Methods for Teams

- Goal Provide a practical set of processes and methods that enable team facilitators, managers, coaches, and members maximize the knowledge, experiences, skills, and attributes of team members.
- About this There may be items in this document which are “new” to you or need you to do your own digging to fully understand the reference. If the issue, process, method, or example doesn’t work for you right now, just let it go. In many ways, working with groups and teams is much more complicated than working with individuals in a developmental way. With groups and teams, the work is not only with the individual psychology of each member but it is also the psychology of the set of people that make up the team and group. It is an established fact that when people get together, there is a social psychology at play. That energy can be used for the benefit of the group.
- Assumptions When working with groups and teams, there are a number of issues that need to be in the awareness of the team leader, manager, facilitator, coach (and a metaphor to help it stick):
- Each member of the group or team brings a diverse set of team related experiences. These experiences inherently “color” perceptions about the team work and their optimism for how well the team work will go. It is for this reason, that a thorough team development plan is necessary that involves “tilling” the soil of the team members, “planting” specific seeds that grow team fruit producing plants, and “nurturing” those plants to continue to feed the team.
 - Each member of the team is at a different level of development as it relates to their own individual growth and as it relates to the skills, perceptions, and meaning-making of each person. Skills are horizontal developmental goals—for example, the skill of active listening. Perceptions are levels of awareness about the dynamics that are involved. Feedback and dialog are essential to enhancing perceptions. Meaning-making is a vertical developmental goal—for example, movement from binary thinking to systems thinking. All of these differences must be constructively managed if a team is going to be successful.
 - You have to be brain savvy to make the most of the learning situation with teams. We already know that in a group, individual’s defenses and sensitivities are alerted. We already know that in a group, the primary issue that must be settled is “why am I in this group and why are they?” —which is an emotional alarm about seeking safety. We know that if we are going to maximize the talent around the table with a team, we need to create the psychological container that reduces alarm and increases the conditions for working with others.
 - There are no short cuts. And there are a lot of serious mistakes that get made such that a group never becomes a team and certainly never utilizes its energy and capabilities in the most effective way.

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The Call

If I had \$100 for every time I've had the following conversation, I could own several Greek Islands.

Manager: "I've got a team that isn't working too well. They've been responsible for a product launch and they are six months behind schedule. There is a lot of infighting and disagreement. Some members of the team really don't like several other people on the team but I've told them to put their big boy/girl pants on and make it happen. I've heard that you help with teams and that you could do a team workshop. I have 50 minutes set aside for a team exercise next month, can you do it?"

Roger: "Interesting problem. What is it costing the business?"

Manager: "What does that have to do with anything?"

Roger: "Well, we can't really determine if it is a problem worth fixing if we don't know what it is costing the business. If it is costing the business nothing, why have a program? You said it was 6 months behind. Is that expensive?"

Manager: "Well, yes. There is revenue not coming into the business. Based on our projections we are behind 2 million dollars and it cost about \$300,000 per month of lost revenue, not counting the time and investment of people getting together working on this when they could be working on something else."

Roger: "So the business is losing a great deal of money. People on the team are not productive. There is a very uncomfortable work environment. This has been going on for some time. And you think that a 50 minute workshop is going to solve a multi-million dollar problem?"

Manager: "What is it going to take?"

Underneath

This conversation is suggestive of a number of things. Here are some possibilities:

- The manager doesn't really understand how teams work and knows that the lack of productive outcomes indicate there are issues. (Manager: "Good high performing employees know how all this works.")
- The team doesn't have the skills or capabilities to address their issues. (Manager: "They've been on teams before.")
- The dynamics are producing reciprocally negative conditions—lack of feedback leads to made up stories attributing negative intentions to others. (Manager: "They can put their big pants on and get on with it.")
- Likely that unresolved issues such as specific goals, team structure, team metrics, team responsibilities have never really been addressed. (Manager: "They are smart, they will figure it out.")

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Mistakes

Consultants and team coaches make the following mistakes at this point in Team consulting:

- Introduce an assessment such as the MBTI, DISC, Big Five, etc. —this usually simply calcifies attitudes
- Present a team model —if they had a map to incorporate this kind of thinking, it would already be used
- Assume that the team manager or team lead knows the whole story —they typically haven't been listening

Tilling

If ever there was a time for taking the time to engage team members before a team training session, this is the moment. If a team has been told that a development program is going to be available, the best thing to do in the welcome email introducing you as the facilitator is to attach a short survey and ask they they get their responses to you within a few days prior to the meeting. It is best to ask a few short questions like:

(1) On previous successful teams you've been part of or have observed, what were the attributes that made a difference in your organization?

(2) What are the main obstacles of the current team becoming a high performing team?

(3) What one thing could team members do to elevate the performance of this team?

While the answers to these questions will not surprise, the fact that you asked them is very important. It is best to prepare a summary report which will show the perspectives, in order of highest frequency first. For example, if most team members mention the need for more trust, then that gets listed first. It is vital that every idea get included, even if mentioned only once.

When reviewing the results, ask team members to unpack what a comment means to them. "If a half of you feel that.....what does it look like in team meetings?"

From these discussions, ask, **how can we operationalize this idea as a key team guideline?**

The end of this discussion should be no more than ten statements of how the team wants to work to get to high performance. When they say things like, "Be respectful of each other" push on what that looks like. How would you know someone isn't respectful? And what needs to happen when this line is crossed?

By doing this "tilling" you are preparing for introducing a way of operating that elevates team behavior that is parallel to team deliverables. This process is getting team members involved in creating a map of behavior on what they believe is important and becomes a future guardrail they can call upon for checking on how they are doing and when feedback is needed.

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Tilling Con't Teams that DO NOT build a set of guidelines will not be successful with any other effort that is attempted. Without a set of guidelines they have created, there is nothing on which they can hold each other accountable for teaming behavior. Without a set of guidelines building trust is virtually impossible. And without accountability and trust, everything else is simply playing at paste. This principle must be baked into developing teams: there is an interdependent and reciprocal relationship with working on team deliverables and working on teaming—-and these are NOT THE SAME!.

We need to remember that we need to help use their energy to reduce the discomfort or internal “noise” about working with people in the given group. And we need to help them see that whatever the answer is, it is with them and their behavior.

Planting Bringing focus to the teaming behavior allows for planting KSAT as a library for them to consider and prioritize. By them sorting the Drivers and Practices and identifying what is mission critical for their work, they are creating a definitive set of standards which has their finger prints all over it. It is likely that 90% of everything they mention in their team guidelines have a direct alignment with either a KSAT Driver or Practice.....usually two or three linkages.

It is important to build linkages that are explicit between their guidelines that have been organically developed and the library which is research driven. This affirms that they are on the right track and leads to “how we can improve or tune up our skills. Once they have this team profile in place, the opportunity to introduce surveys is a natural path. Sometimes the MBTI is an excellent tool for getting into the language of appreciation and empathy. Sometimes the Hogan is useful for exploring key factors both present and missing from the team talent. The Pearman Personality Integrator is excellent for getting individuals to look at their patterns and what they can do more of to increase personal agility.

Using a KSAT 360 tool can be vital here. An Individual team member 360 can help team members learn how they are perceived related to team Drivers and Practices. A Team Composite 360 lets the team see what it is thinking about itself. These surveys have different purposes. One is for focusing on individual development that could be relevant to all the teams a team members is on. One is for focusing on a given team and how that team sees itself operating.

Nurturing The teaming development agenda will include a number of topics that emerge from the profile created with the KSAT library. Three things, though, must be on the agenda: (1) **feedback methods and feedback frequency**, (2) **regularly planned team debriefs on how the team is doing per its created guidelines**, and (3) **after action reviews**. There is abundant evidence that a team will fail if they do not do these things. They can be phenomenal in so many things such as planning, and debating issues, and responding to their stakeholders, but if they do not do the three things just listed, cracks will begin to develop in trust and in their sense of personal commitment that will become grand canyons separating people who have nothing but good will and high aspirations.

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Feedback (KSAT Drivers 7,8,9 and Practices 1,2,5,15,16,17,18,19,20,21,22,23, 25, 26)

Both the simplest and hardest behavior for teams to establish is providing feedback and seeking feedback. Feedback can come in many forms but there is only one form that has the best chance of fostering mutual regard and high levels of understanding. A simple statement illustrates: “Jerry, in yesterday’s team meeting when you presented the data charts, I found that for the first time I really understood why this decision is so important.” Another example, “Jerry, in yesterday’s team meeting, I shared my reaction several times about the issues and you announced that what I was mentioning was irrelevant. I’m puzzled and since I want us to work well together, I need to understand. Tell me more.”

What do these two illustrations have in common? Specific time and place. Specific behavior. And a personal observation of impact. And a request to explore.

If we are going to get a person to repeat what is going well or to tweak what isn’t going well, we need the place, behavior, and consequence outlined. These are not judgments like (you were great or your declarations were mean spirited).

Team Guidelines Review (KSAT Drivers 1,2, 7,9 and Practices 1,2,3,4,5,7,8,9,11,13,16,17,18,19,20,21,22,23,24,25, 26)

If we don’t have guidelines, we have no basis for feedback that has meaning within the group. We have no basis for agreeing to what needs to be a priority for team functioning. And if we don’t review, we don’t know how we are doing and what may need to be adjusted. This needs to be a “living document” in the team so that it becomes a kind of talisman or home base. It is the explicit statement of how we want to operate as a team and as such is our internal contract. If we do not check on it, on how we are doing, on what may need to be adjusted, added or dropped, or even reminded about what the team felt when it started, it is looking into an abysses of team meaninglessness.

Team After Action Review (KSAT Drivers 1,2,3, 5,6, 7, 8, 10 and Practices 2,4, 5,9 10, 12, 18,20, 22, 24, 25, 26)

Teams need to review their decisions and deliverables on a regular basis. They especially need to look at those things that were not as successful as initially thought. An after action review is NOT A BLAME GAME but a thoughtful look at what went well, where we missed the mark, how we can adjust next time, and exploration of what was individually and collectively learned.

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Resources In addition to the KSAT DIY, KSAT Sort Cards, integrative placemats, and linkage to the entire KSA library, these are useful:

Weisbord, M., **Productive Workplaces**. Weisbord's brilliant and practical set of tips and suggestions are exceptionally relevant to attending to team related processes.

The Team Handbook, by Scholtes, Joiner, and Streibel may well be the most practical and handy book of materials ever printed for teams.

Check List

- Develop a team engagement plan with goals and benchmarks
 - Launch communication is essential—who, what, where, and when
 - Set expectations for team development experiences
- Have the team members complete a short pre-engagement survey—group qualitative answers on items like “creating a safe team environment means.....”
 - Survey sent after launch communication, explains only trending and themes are summarized
 - Prepare summary report
- Have the team complete a virtual KSA-T sort based on a custom question such as “sort the behaviors for future success”
 - Sort question clarity is essential for the creation of useful trending data
 - Prepare sorting report for team review
- In first team facilitation, identify team guidelines and behavior expectations (e.g. everyone shares, time limits are established for sharing and group discussions, etc.)
- Review pre-engagement survey themes; decide on actionable points and integrate with team guidelines
- Review virtual sort analysis; settle on key Drivers and Practices for team effectiveness
- Discuss and agree on either the KSAT 360 for individual team members or the KSAT TeamCentric survey
- Launch KSAT survey: if 360, individual interpretation sessions are to be organized and only group data shared with the whole team; if TeamCentric survey used, prepare reports for group facilitation
- Produce Group Reports from KSAT surveys and make developmental recommendations
- Build into team processes feedback, guideline checks, and after action review