

THE TEAM PROCESS



LEADERSHIP & MEMBERSHIP

QUESTIONS & TRAPS



"CONTEXT & PURPOSE"

THE TEAM PROCESS DESCRIBES THE WORK THAT A TEAM GOES THROUGH TO BE SUCCESSFUL IN WORKING TOGETHER. THERE ARE NO 'RIGHT' WAYS TO UNDERTAKE EACH WORK STEP IN THE TEAM PROCESS. THE CHOICE OF AN APPROPRIATE METHODOLOGY FOR EACH STEP IS PART OF THE WORK OF LEADING. FURTHER FOR LEADERS AND MEMBERS, BEING AWARE OF THE POTENTIAL ISSUES AND TRAPS IN EACH PIECE OF WORK SHOULD HELP US TOWARDS MORE EFFECTIVE JUDGEMENT.

THE PURPOSE OF THIS BOOKLET IS TO SUPPORT YOU IN THE MORE EFFECTIVE USE OF THE TEAM PROCESS IN YOUR WORK BY PROVIDING SOME MORE DETAILED SUGGESTIONS ABOUT EACH WORK STEP"

THIS BOOKLET IS BASED ON TRAINING MATERIAL ORIGINALLY PRODUCED BY MACDONALD ASSOCIATES CONSULTANCY (MAC). MAC IS A WORLDWIDE GROUP OF ORGANIZATION CONSULTANTS WHO WORK WITH LEADERS IN ORGANIZATIONS USING THEORY KNOWN AS 'SYSTEMS LEADERSHIP'. FOR MORE INFORMATION REFER TO WWW.MACCONSULTANCY.COM.

'SYSTEMS LEADERSHIP' DEVELOPED BY IAN MACDONALD AND OTHERS, IS A SET OF INTEGRATED ORGANIZATION MODELS ALLOWING BETTER UNDER STANDING, ANALYSIS AND PREDICTION OF BEHAVIOUR OF PEOPLE WORKING IN ORGANIZATIONS.

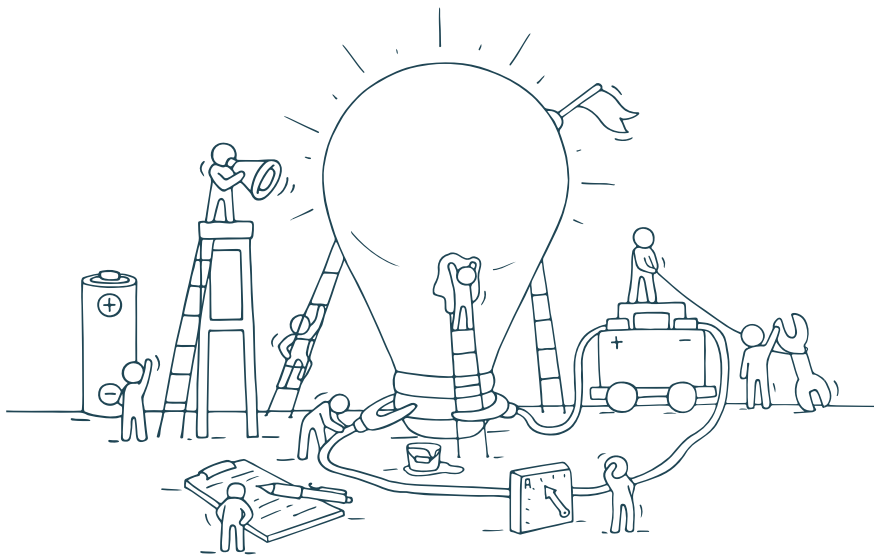
MATERIAL FROM THIS BOOKLET IS THE INTELLECTUAL PROPERTY OF MACDONALD ASSOCIATES CONSULTANCY.

PREPARED BY PHILLIP BARTLETT



TEAM:

'A TEAM IS A GROUP OF PEOPLE, INCLUDING A LEADER, WITH A COMMON PURPOSE WHO MUST INTERACT WITH EACH OTHER IN ORDER TO PERFORM THEIR INDIVIDUAL TASKS AND THUS ACHIEVE THEIR COMMON PURPOSE'



ROLES WITHIN A TEAM:

TEAM LEADER:

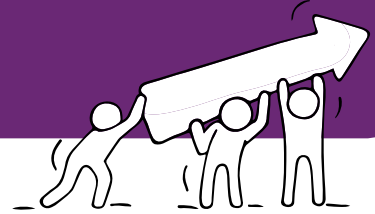
“TO CREATE, MAINTAIN AND IMPROVE THE CULTURE OF A GROUP OF PEOPLE SO THAT THEY ACHIEVE OBJECTIVES AND CONTINUE TO DO SO OVER TIME”

TEAM MEMBERS:

“TO BE ACTIVELY INVOLVED IN THE TEAM PROCESS AND TO CONTRIBUTE CRITICALLY TO THE PLANNING AND IMPLEMENTATION OF THE WORK.”



CONTEXT AND PURPOSE



LEADER'S QUESTIONS

- ▶ WHAT IS GOING ON AROUND US THAT'S IMPORTANT?
- ▶ WHO SHOULD BE INVOLVED IN THIS?
- ▶ WHAT DO PEOPLE NEED KNOW?
- ▶ HOW SHOULD I CONVEY THIS?
- ▶ HOW DO I KNOW PEOPLE UNDERSTAND?
- ▶ WHAT HAS LED TO US NEEDING TO DO THIS WORK?
- ▶ WHO ELSE IS / COULD BE IMPACTED BY THIS?

KEY TRAPS AND ISSUES

- ▶ ASSUMING PEOPLE UNDERSTAND THE CONTEXT
- ▶ ASSUMING PEOPLE KNOW WHY THEY'RE HERE
- ▶ TEAM MEMBERS NOT LISTENING
- ▶ STARTING TO SOLVE THE PROBLEM BEFORE I UNDERSTAND IT ALL
- ▶ ASSUMING I KNOW WHAT'S COMING
- ▶ NOT INDUCTING NEW TEAM MEMBERS

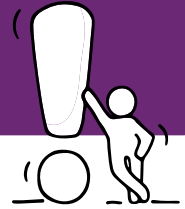
TEAM MEMBERS' QUESTIONS

- ▶ HOW DOES THIS LINK TO MY OTHER WORK?
- ▶ DO I REALLY UNDERSTAND THE PURPOSE?
- ▶ WHAT DO I NEED TO ASK ABOUT HERE?
- ▶ HOW WILL WE / I KNOW WHEN WE'VE DONE IT RIGHT?
- ▶ CAN I ARTICULATE THE CONSTRAINTS CORRECTLY?
- ▶ COULD I EXPLAIN IT TO SOMEONE ELSE CONFIDENTLY?

PROCESS CHOICES

- ▶ WHAT'S THE BEST LOCATION FOR THIS MEETING?
- ▶ ONE MEETING OR SEVERAL?
- ▶ LARGE OR SMALL?
- ▶ DO I NEED PRE-WORK TO HELP THIS?
- ▶ DO I NEED VISUAL AIDS TO ASSIST CLARITY?
- ▶ CONFIRMATORY NOTES, EMAIL?

IDENTIFY CRITICAL ISSUES



LEADER'S QUESTIONS

- ▶ WHAT COULD GO WRONG THAT WOULD PUT THE OUTCOMES AT RISK?
- ▶ WHAT IF? HOW TO?
- ▶ WHO WILL THIS IMPACT?
- ▶ WHAT HAVE WE LEARNT FROM DOING THIS BEFORE?
- ▶ WHO COULD SHED SOME LIGHT ON RISKS AND ISSUES?
- ▶ WILL ANYTHING GOING ON AROUND US IMPACT US?
- ▶ ANY ISSUES WITH THE TEAM ITSELF?

KEY TRAPS AND ISSUES

- ▶ DISMISSING CRITICAL ISSUES ON THE GROUNDS THAT IT'LL BE OK
- ▶ MOVING ON TO COMING UP WITH A PLAN TOO QUICKLY
- ▶ IDENTIFYING CRITICAL ISSUES BUT NOT ATTENDING
- ▶ NOT MANAGING THE TIME
- ▶ ASSUMING THE CURRENT PEOPLE HAVE ALL THE INFORMATION, SKILL AND KNOWLEDGE NEEDED

TEAM MEMBERS' QUESTIONS

- ▶ WHAT HAPPENED LAST TIME?
- ▶ IN WHAT WAY IS THIS DIFFERENT / SIMILAR TO OTHER TIMES?
- ▶ WHAT SORTS OF THINGS COULD IMPACT ON THIS?
- ▶ DO I HAVE EXPERIENCE OF ANY SIMILAR ACTIVITIES THAT COULD HELP?
- ▶ AM I THINKING ABOUT ALL THE PROBLEMS FROM THE BEGINNING TO THE END?
- ▶ ANY ISSUES / RISKS WITH THE PLANS BEING SUPPLIED?

PROCESS CHOICES

- ▶ 1 AT A TIME AROUND THE GROUP?
- ▶ 1-1 OR SMALL GROUPS AND REPORT BACK?
- ▶ TIME TO WANDER AND THINK?
- ▶ LARGE GROUP DISCUSSION (MANAGEMENT)?
- ▶ DEAL WITH EACH AS THEY COME UP OR AFTER SUMMARISING?
- ▶ DO I NEED A SCRIBE?
- ▶ STICKY NOTES, CHARTS, PAPER?

GENERATE CONTRIBUTIONS



LEADER'S QUESTIONS

- ▶ BEST WAY TO GATHER IDEAS?
- ▶ HAVE I GOT EVERYONE'S IDEAS (RECOGNISED)?
- ▶ DO WE HAVE ALTERNATIVES?
- ▶ ARE PEOPLE GIVING IDEAS SIMULTANEOUSLY AND SO WE ARE LOSING SOME?
- ▶ HAVE WE HEARD / CAPTURED EVERYONE'S IDEAS?
- ▶ HAVE I GIVEN FEEDBACK TO THOSE WHO CONTRIBUTED AS TO HOW THEIR IDEAS HAVE BEEN USED OR NOT?

KEY TRAPS AND ISSUES

- ▶ DECLARING THE FIRST AND ONLY IDEA TO BE A GOOD ONE AND GOING WITH IT
- ▶ JUDGING IDEAS TOO SOON AND HAVING PREMATURE CLOSURE
- ▶ POOR SOCIAL PROCESS OF IDEA COLLECTION
- ▶ IGNORING SOME TEAM MEMBERS UNINTENTIONALLY

TEAM MEMBERS' QUESTIONS

- ▶ WHAT CAN I ADD?
- ▶ HOW TO BUILD ON IDEAS OF OTHERS?
- ▶ AM I PRACTICING ACTIVE LISTENING?
- ▶ AM I SURE MY CONTRIBUTION IS RELEVANT?
- ▶ AM I SPEAKING OVER OTHER PEOPLE?
- ▶ AM I LETTING OTHERS DOMINATE?
- ▶ DO I KNOW WHAT HAS HAPPENED TO MY CONTRIBUTIONS?

PROCESS CHOICES

- ▶ 1 AT A TIME AROUND THE GROUP?
- ▶ 1-1 OR SMALL GROUPS AND REPORT BACK?
- ▶ TIME TO WANDER AND THINK?
- ▶ LARGE GROUP DISCUSSION (MANAGEMENT)?
- ▶ DEAL WITH EACH AS THEY COME UP OR AFTER SUMMARISING?
- ▶ DO I NEED A SCRIBE?
- ▶ STICKY NOTES, CHARTS, PAPER?

FORMULATE AND ARTICULATE A PLAN

LEADER'S QUESTIONS

- ▶ CAN I ARTICULATE ALL THE STEPS?
- ▶ CONTINGENCY? WHAT IS IT?
- ▶ DOES THIS PLAN ADDRESS ANY OF THE IDENTIFIED CRITICAL ISSUES?
- ▶ MONITORING: HOW WILL I DO THIS?
- ▶ RISK ASSESSMENT?
- ▶ HAVE WE GOT ANSWERS FOR OR CHECKED ALL OUR ASSUMPTIONS ABOUT OUR CRITICAL ISSUES?
- ▶ DOES THE PLAN TAKE US RIGHT FROM THE BEGINNING ALL THE WAY TO THE END?
- ▶ HAVE I DEALT RESPECTFULLY AND HONESTLY WITH CONTRIBUTIONS THAT CAN'T BE USED?

KEY TRAPS AND ISSUES

- ▶ WAITING TOO LONG OR NOT LONG ENOUGH TO MAKE A DECISION
- ▶ BOWING TO MEMBERS' VIEW IF YOU BELIEVE ITS NOT CORRECT
- ▶ ASSUMING TEAM MEMBERS UNDERSTAND THE PLAN – NOT CHECKING
- ▶ ARTICULATING MORE THAN ONE PLAN / IDEA – NOT BEING CLEAR
- ▶ IGNORING PEOPLE WHO DISAGREE / RESIST

TEAM MEMBERS' QUESTIONS

- ▶ DOES THE PLAN MAKE SENSE TO ME?
- ▶ IS THE PLAN ACHIEVABLE?
- ▶ HAS THE PLAN ADDRESSED THE ISSUES I AND OTHER TEAM MEMBERS ARE CONCERNED ABOUT?
- ▶ HOW CAN I GET ON BOARD WITH THIS PLAN EVEN IF IT WASN'T MY SUGGESTION?
- ▶ WHAT SKILLS CAN I CONTRIBUTE TO THIS PLAN?
- ▶ ARE THERE SPECIFIC TASKS WITHIN THE PLAN THAT I CAN VOLUNTEER FOR?

PROCESS CHOICES

- ▶ HOW TO MAINTAIN ATTENTION WHILE EXPLAINING?
- ▶ HAVE PEOPLE LOOK AT YOU (AID) WHILE EXPLAINING?
- ▶ HAVE THE TECHNICAL EXPERT (IDEA OWNER) EXPLAIN?
- ▶ HAVE PEOPLE REPEAT IT BACK TO YOU?

ASSIGN & ACCEPT TASKS, IMPLEMENT PLAN

LEADER'S QUESTIONS

- ▶ WHO SHOULD DO WHAT?
- ▶ WHAT ARE THE MECHANISMS FOR CARRYING / MONITORING?
- ▶ AM I IN A POSITION TO MONITOR WELL?
- ▶ IS THIS A DEVELOPMENT OPPORTUNITY FOR A TEAM MEMBER?
- ▶ HAVE THE PEOPLE IN THE TEAM CHANGED?
- ▶ DO THEY KNOW THEY CAN CLARIFY THEIR TASKS WITH ME IF THEY NEED TO?
- ▶ AM I AVAILABLE FOR CLARIFICATION?

KEY TRAPS AND ISSUES

- ▶ INAPPROPRIATE CHOICE OF PERSON
- ▶ ONE WAY TASK ASSIGNMENT RATHER THAN TRANSACTIONAL
- ▶ ASSUMING YOU UNDERSTAND YOUR TASK
- ▶ NOT CONSCIOUSLY BRINGING 'NEW' MEMBERS UP TO SPEED

TEAM MEMBERS' QUESTIONS

- ▶ HOW DOES MY TASK FIT WITH WHAT OTHERS ARE DOING?
- ▶ HOW MUCH DISCRETION DO I HAVE?
- ▶ WHERE DO I GET HELP IF NEEDED?
- ▶ HAVE I GOT CLEAR CPQRT?
- ▶ CAN I USE MY KNOWLEDGE TO HELP THE LEADER WORK OUT THE TASK ASSIGNMENT?
- ▶ HOW MUCH DISCRETION HAVE I GOT?

PROCESS CHOICES

- ▶ CPQRT
- ▶ INDIVIDUAL ASSIGNMENTS?
- ▶ ASSIGNMENTS IN A GROUP SO OTHERS UNDERSTAND?
- ▶ SMALL GROUPS FOR PARTS OF THE TASKS / PLAN?
- ▶ PEOPLE REPEAT BACK TASK ASSIGNMENT?
- ▶ WRITTEN ASSIGNMENT?

MONITOR PROGRESS AGAINST PLAN



LEADER'S QUESTIONS

- ▶ HAS ANYTHING CHANGED?
- ▶ ARE WE ON TRACK / SCHEDULE / PLAN?
- ▶ AM I IN A POSITION TO DO THIS?
- ▶ ARE ANY NEW CRITICAL ISSUES ARISING?
- ▶ IS THERE ANY AT RISK BEHAVIOUR?
- ▶ ARE WE ON BUDGET?
- ▶ DO I HAVE A GOOD UNDERSTANDING OF HOW INDIVIDUALS ARE FEELING ABOUT THEIR WORK?
- ▶ ARE THERE TEAM MEMBERS WHO REQUIRE CLOSER / DIFFERENT MONITORING?

KEY TRAPS AND ISSUES

- ▶ NOT SETTING UP AN EFFECTIVE WAY OF MONITORING
- ▶ GETTING TIED UP DOING; SO NOT BEING ABLE TO MONITOR
- ▶ NOT LISTENING TO ISSUES AND CONCERNS BEING RAISED ABOUT PROGRESS
- ▶ IGNORING SOCIAL ISSUES – LETTING THEM GROW
- ▶ JUST COACHING ON TECHNICAL ISSUES
- ▶ NOT ENCOURAGING TM'S TO COACH EACH OTHER

TEAM MEMBERS' QUESTIONS

- ▶ IF MY LEADER, OR ANOTHER TEAM MEMBER, HAD THE DATA I HAVE JUST FOUND WOULD THE TASK CHANGE SUBSTANTIALLY?
- ▶ AM I COMING ACROSS NEW CRITICAL ISSUES THAT NEED ADDRESSING?
- ▶ AM I ON TRACK IN TERMS OF SCHEDULE, TECHNICAL SPECIFICATION AND WORKING AS A MEMBER OF THE TEAM?

PROCESS CHOICES

- ▶ WHAT MEASURES ARE IMPORTANT HERE?
- ▶ DIFFERENT MONITORING FOR DIFFERENT PEOPLE?
- ▶ CHOOSING KEY MILESTONES TO MONITOR AT (TIME? EVENT?)
- ▶ FORMAL REPORT OR CONVERSATION?
- ▶ VISUAL DISPLAY?
- ▶ WHAT ARE THE PROCESS / QUALITY MEASURES?
- ▶ PROCESS TO UPDATE THE WHOLE TEAM?

COACH, REDEFINE TASKS IF NECESSARY



LEADER'S QUESTIONS

- ▶ WHO NEEDS HELP / ENCOURAGEMENT / STOPPING?
- ▶ HOW DO I BEST ASSIST THEM?
- ▶ DO I NEED TO REASSIGN SOME TASKS?
- ▶ WHAT DO I CHANGE AND TO WHAT?
- ▶ AM I GIVING ENOUGH FEEDBACK?
- ▶ AM I INTERFERING TOO MUCH?
- ▶ WHAT CAN I LEARN FROM WHAT'S GOING ON?

TEAM MEMBERS' QUESTIONS

- ▶ HOW IS MY TASK GOING AGAINST 'THE' PLAN?
- ▶ DO I NEED ANY HELP IN THIS? CAN I ORGANISE IT?
- ▶ HAVE THINGS SIGNIFICANTLY CHANGED SINCE I STARTED AND SHOULD I RAISE THIS? (TASK VIABLE STILL)
- ▶ ARE THERE BETTER WAYS I CAN SEE OF DOING WHAT I AM DOING?

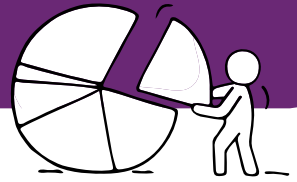
KEY TRAPS AND ISSUES

- ▶ NOT DEALING WITH AN ISSUE THAT'S OCCURRING – LETTING PEOPLE RUN WHEN IT'S NOT WORKING
- ▶ OVER-COACHING NOT ALLOWING PEOPLE TO LEARN – GIVING SOLUTIONS
- ▶ TAKING OVER THE MANAGER'S AUTHORITY
- ▶ ADJUSTING FOR ITS OWN SAKE – NEED TO BE SEEN TO BE DOING SOMETHING
- ▶ MISSING CUES THAT THE WHOLE PLAN NEEDS CHANGING

PROCESS CHOICES

- ▶ INDIVIDUAL DISCUSSION?
- ▶ SUB-TEAM REVIEW?
- ▶ WHOLE TEAM MEETING?
- ▶ NEED TO ADJUST MONITORING PROCESS?
- ▶ NEED TO ADJUST MEASURES?
- ▶ HOW TO REINFORCE DESIRED BEHAVIOURS?

REVIEW & CAPTURE LEARNINGS



LEADER'S QUESTIONS

- ▶ WHAT WORKED IN THE PROCESS?
- ▶ WHAT DIDN'T WORK WELL?
- ▶ WHAT WOULD I / WE HAVE DONE DIFFERENTLY
- ▶ HOW CAN WE APPLY THE LESSONS TO NEXT TIME?
- ▶ HOW DO WE PASS THESE ON OR RETAIN THE LEARNING?

TEAM MEMBERS' QUESTIONS

- ▶ WHAT DID I DO THAT WORKED WELL?
- ▶ WHAT COULD I HAVE DONE DIFFERENTLY?
- ▶ DO I KNOW HOW MY LEADER THINKS I WENT?
- ▶ WHAT ELSE DID I SEE THAT I SHOULD RAISE?
- ▶ WHAT WILL I DO DIFFERENTLY IN THE FUTURE?
- ▶ CAN I OFFER USEFUL, HONEST AND RESPECTFUL FEEDBACK ON OTHER TEAM MEMBER'S WORK?

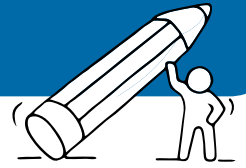
KEY TRAPS AND ISSUES

- ▶ NOT FINDING TIME TO REVIEW
- ▶ NOT SETTING A TIME TO DO THIS
- ▶ TALKING ONLY ABOUT THE TECHNICAL SOLUTION
- ▶ NOT BEING HONEST ABOUT ISSUES
- ▶ ATTACKING PEOPLE NOT USES
- ▶ NOT ACTING ON WHAT HAS BEEN LEARNT
– ENDING UP DOING THE SAME THING AGAIN

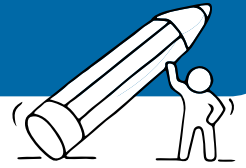
PROCESS CHOICES

- ▶ WHOLE TEAM MEETING?
- ▶ INDIVIDUAL CONTRIBUTION AND PLENARY?
- ▶ 1-1 OR SMALL GROUPS AND REPORT BACK?
- ▶ HOW TO DEAL WITH TECHNICAL, COMMERCIAL AND SOCIAL?
- ▶ DO I NEED A SCRIBE? STICKY NOTES, CHARTS, PAPER?
- ▶ HOW TO REINFORCE DESIRED BEHAVIOURS?
- ▶ COMMUNICATION STRATEGY & ACTIONS?

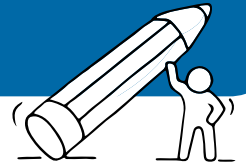
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TEAM PROCESS MODEL

