Team Start Up and Team Build Kit

RYAN BANNERMAN
ASSOCIATES

People Effectiveness & Communications Solutions

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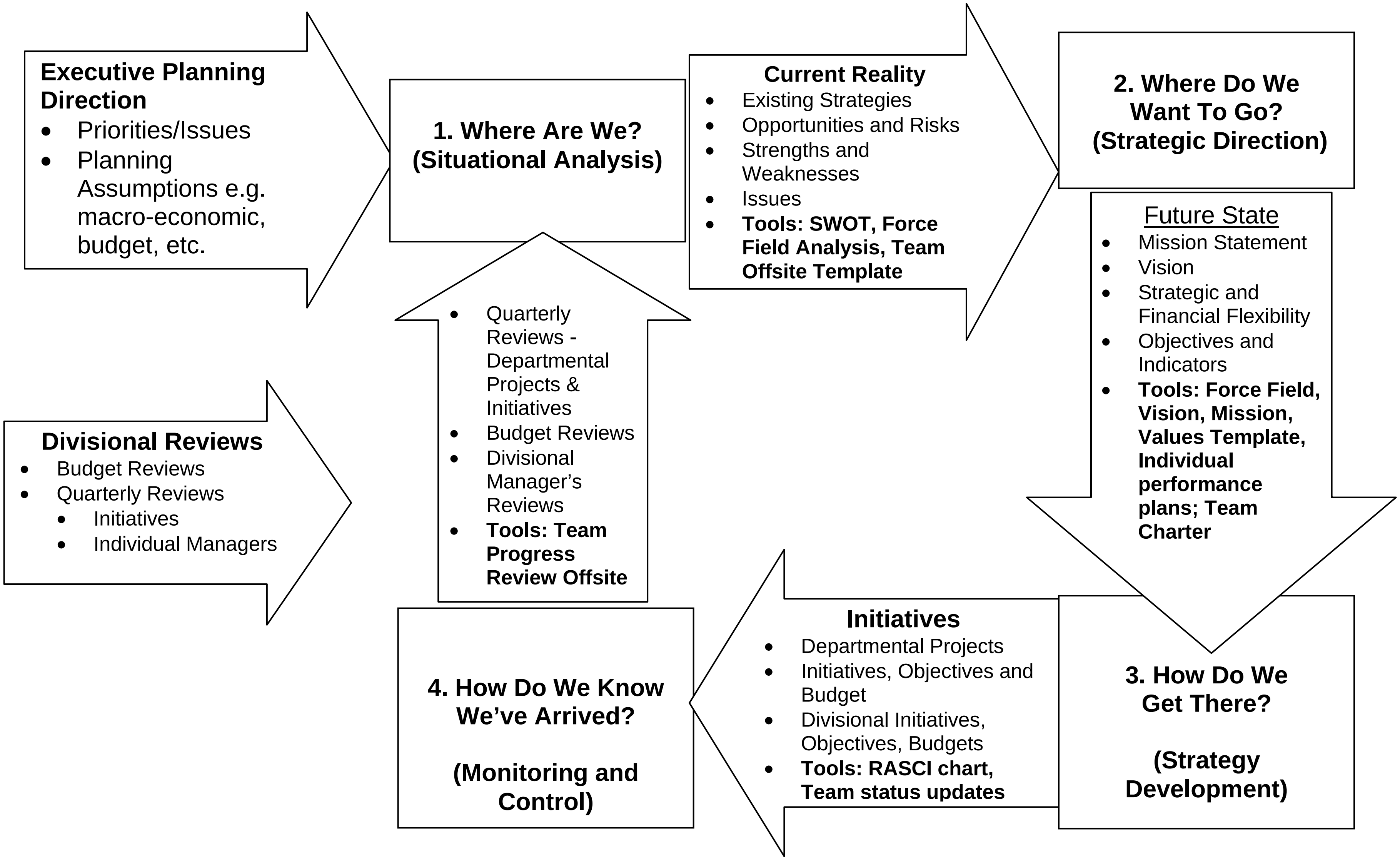
How to use the Team Start Up/Team Build Template

1. Review the Four Step Planning and Control Framework.
2. Locate where your team is in the business cycle.
3. Review the Tools suggested in each section to help you work through the plan, do, check, act of the yearly business cycle.

Planning & Control Framework
Four Key Components



Strengths, Weaknesses, Opportunities, Threats (SWOT)

Key Strategies	**Strengths** 1.	**Weaknesses** 2.
Opportunities 3.	**Offensive Strategies** (Strengths + Opportunities)	**Fix Strategies** (Weaknesses +Opportunities)
Threats 4.	**Neutralize Strategies** (Strengths + Threats)	**Defensive Strategies** (Weaknesses + Threats)

Force Field Analysis

Purpose

- Force Field analysis can help a team identify a desired vision, mission or goals.
- Force Field analysis is useful for identifying how to move from the current state environment to a desired future environment.

Outcomes

- Description of vision/desired future state.
- Identification of barriers/obstacles with an action plan to resolve.
- Identification of positive forces with an action plan to maintain what's working.

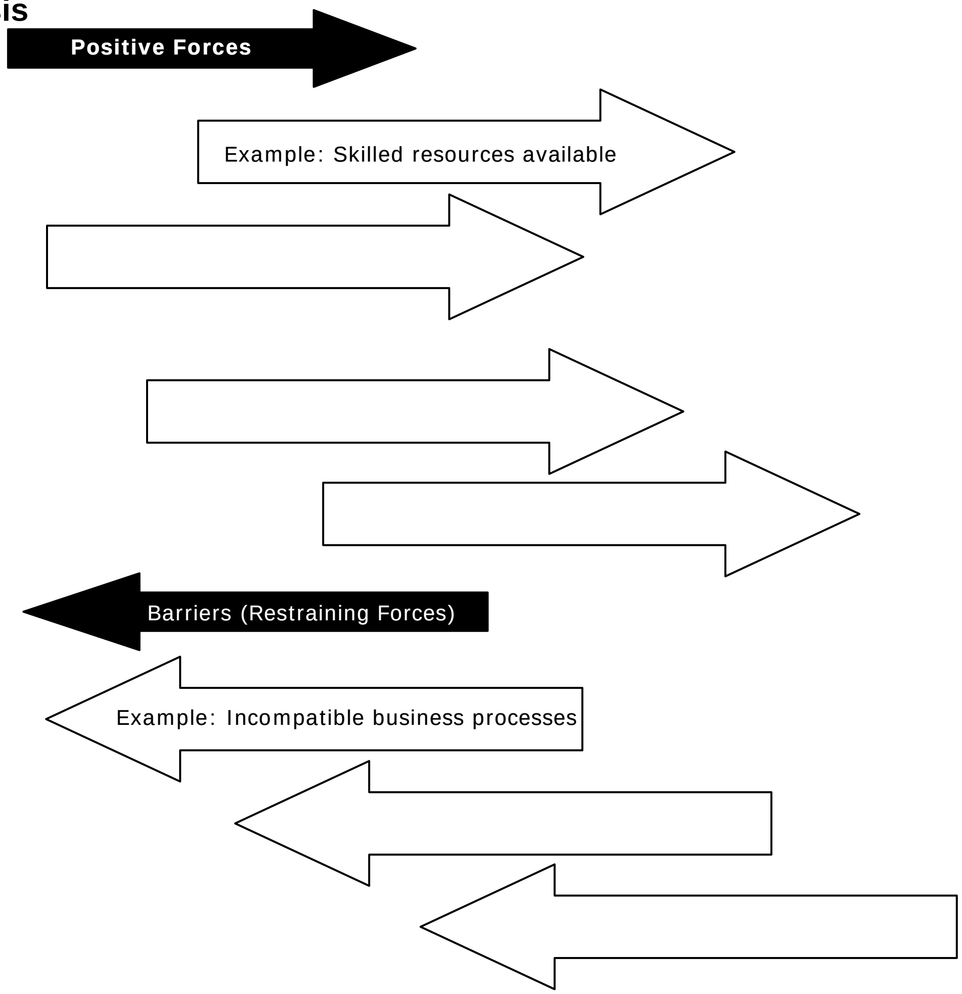
Process to Conduct a Force Field Analysis

1. **Future State** analysis: Post a heading on a wall or flipchart labeled Future State. This space will be used to record a description of the vision or the key elements of the vision. If available, consult current mission/vision and direction. Discuss with group if the existing vision aligns to company/department strategy, is relevant, and still a desired direction. If it is, it can be used for this portion of the analysis. If not, to update the vision or create a new one, the following techniques may be helpful.
   - Use brainstorming as a technique for discussion. In brainstorming, all input and ideas are encouraged; there is no judgment or evaluation of contributions. The facilitator or scribe captures the ideas on the flipchart/whiteboard and the most applicable ones are then chosen as inputs to the vision. OR
   - Ask participants to jot their thoughts down about the desired vision/direction on sticky notes (one idea per note) and post. Sticky notes can then be grouped into like categories or themes and the key elements of the vision will start to become clearer. If re-creating the vision statement or creating a new statement, capture the main points and try not to spend too much time wordsmithing, as the final version can be crafted later.
   - Once the group is satisfied that the main elements of the vision have been captured, move to the analysis of the Current State.
2. **Current State** analysis: The current state analysis can be performed with a similar process to the Future State analysis. Once the group is satisfied that the main elements of the current state have been captured, move to identification of barriers and positive forces.
3. **Identification of Barriers** can be started by asking "What is preventing us from moving towards our desired future state?" Items can be brainstormed or captured on stickies.
4. **Positive forces** can be identified by asking "What's working currently or what is moving us toward the future state that we should continue doing?" These items should be captured on the flipchart or wall as well.
5. **Action Planning**: For each barrier and positive force, have the group identify an action that can be taken, preferably within the following 3 month period, that can start to address a barrier or maintain or strengthen a positive force. Record Actions on a separate sheet and ensure that a person is assigned to each action (they may take accountability for it and delegate it; the key point is to ensure every action has an owner.) and that there is a timeline assigned to each action.
6. **Record** all output from the team session onto the Force Field Analysis template below and review and update the Action Plan at regular team meetings.

Force Field (Gap) Analysis

Current State:

- Describe at a high level current state, for example:
  - Processes not documented
  - Partnerships, agreements
  - Locations



Positive Forces:

- What are some things in the environment that can be leveraged?
- Consider Process, People, and Technology issues.

Restraining Forces:

- What are some of the barriers to getting to the “Future State” that must be addressed?

Document these here then use action plan on next page to capture Action items to address both positive and restraining Forces.

Future State:

- The Vision, where we want to go
  - What would be different, better

Actions Resulting from Force Field Analysis

Action	By When	Accountability

Next Steps to Consider:

Team Offsite Agenda Template

This is a sample agenda with options presented depending on desired outcomes (Note: Not all of this can be done in one day, this is presented as a menu of options.)

Purpose and Outcomes of the Session

- Establish or reinforce some team norms and ground rules to enable smoother team functioning.
- Integrate new members into the team.
- Establish the foundation for a high-performing team through better understanding of members' interpersonal styles.
- Enhance team members' understanding of teamwork and collaboration and the underlying foundations of trust and respect.
- Determine any next steps to keep the team functioning smoothly.

Pre-Work:

1. Online Completion of any pre-reads relating to business goals and strategy, any pre-session surveys, or team building instruments such as Myers Briggs.

Sample Agenda for One-day Session

Morning

- Introductions, expectations and review of purpose and outcomes
    - Ensure shared understanding, clarity and alignment
    - Discuss any additional or conflicting expectations and how to deal with them in this session or subsequent team sessions
- Icebreaker or Team Interpersonal Styles
        - Style Specifics
            - Leader and Team member expectation exchange activity: what works best for each of us
                - How we want to be communicated with
                - How we delegate

        - Best way to tell me a bad news story
        - Best way to recognize me
- Visioning Exercise: Where do we want our team to be in 3 years?
    - What is the Current State?
        - Describe what we work on
        - What's working
        - What's not working
    - What is the Ideal future state?
        - If everything was working the way we want, what would it be like?
    - What Opportunities and Barriers exist in getting toward our vision?
    - How to address those opportunities and barriers in the short term? Building an Action Plan
- If Vision already outlined:
    - Mission, Values and Objectives
        - How does each team members' work and how they do it fit with the vision?

Afternoon

- Application to team's real work:
    - Based on what we have experienced, what ground rules and/or norms do we want to set with this team?
        - Meeting structure
        - Protocols for long-distance that will help address barriers and enhance effective communication (any additional ground rules, tools, processes, roles, e.g., need a facilitator role for long-distance meetings)
    - Clarity and alignment check on team purpose (mission), vision, values, roles/accountabilities and handoff points?
        - Discuss issues and/or capture for next meeting
        - Action Plan: what the team will do differently as a result of this understanding

- Next Steps
    - Identify any key next steps to continue this team's progress towards high performance, for example, do we need to schedule a 1, 3 or 6 month follow up that builds on this session?
    - Action plan: assign who will be accountable for key team development actions by when.

Vision, Mission, Values, Goals (or Objectives)

(Use with Visioning and Force Field analysis to ensure shared understanding of each key concept).

Vision: An image of our desired future

- A vision is a picture of the future we seek to create, described in the present tense, as if it were happening now.
- A statement of vision shows where we want to go, and what we will be like when we get there.
- The more richly detailed and visual the image is, the more compelling it will be.
- A vision gives shape and direction to the organization’s future and it helps people set goals to take the organization closer to its vision.

Mission or Purpose: What the organization is here to do

- A mission or purpose represents the fundamental reason for the group or organization’s existence.
- It describes what we are here to do together.
- Example: our mission is to provide governance and direction, our vision is to shape a leading-edge organization.

Values: How we expect to travel to where we want to go

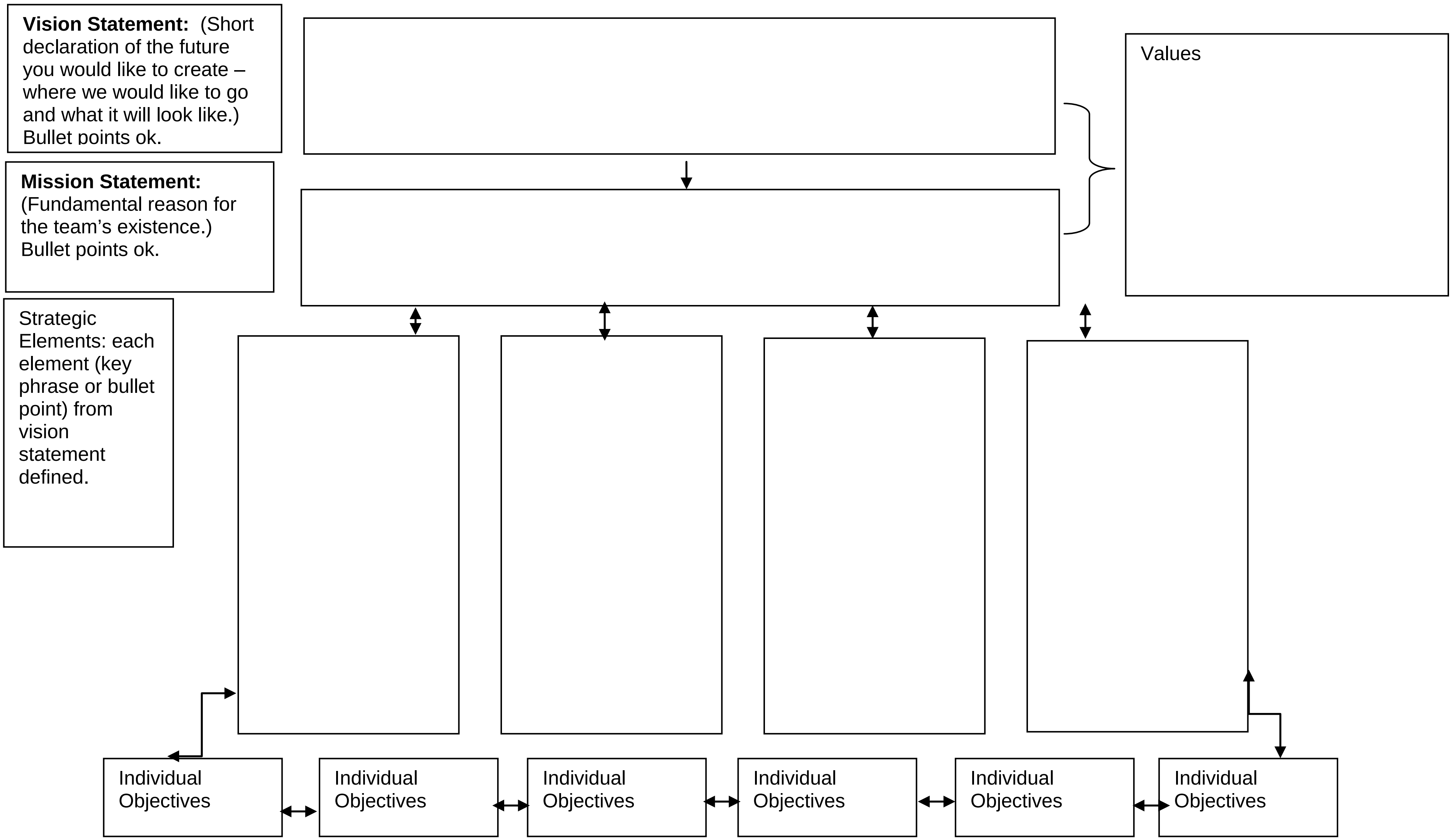
- Values describe how we intend to operate, on a day-to-day basis, as we pursue our vision.
- Values might include: how we want to behave with each other; how we expect to regard our customers; our community, and vendors; and the lines we will not cross.
- Values are best expressed in terms of behavior: If we act as we should, what would an observer see us doing? How would we be thinking?
- When values are made a central part of an organization’s shared vision and put out in full view, they become a guiding symbol of the behavior that will help people move towards the vision.

Goals or Objectives: Milestones we expect to reach before too long

- Goals represent what people commit themselves to do.
- Goals address barriers and obstacles to vision achievement.
- Goals are specific, measurable, actionable, realistic and time-bound.

Vision Template

Vision for 2012: Create a Draft Statement, with Strategic Elements defined, as preparation for discussion with the rest of the team.



Individual Performance Plans *(use this template or own company template to tie individual objectives to team's mission, vision, goals, action items)*

Employee: ______________________ Period Covered: January 1, to December 2009

Job Title: ______________________ Department/ Team: ______________________

Section 1: Performance Areas *Identify the top 3-6 Key Performance Areas and associated performance standards of performance for this role.*				
			Actual	**Comments**
1. Managed financial results		Met – Exceed –		
2 Maintained Safe Operations				
3. Working towards team objectives		Met – Exceed –		
Annual Objectives: *Identify 3-5 annual objectives, linked to the Key Performance Areas identified above.*				
		Overall Performance Area Rating:		

RASCI Chart

R - Responsibility - The individual(s) who actually complete the task or ensures it is complete. This person is responsible for action/implementation. Responsibility can be shared. The degree of responsibility is determined by the person with the A.
A - Accountability - The individual who is ultimately responsible. Includes yes or no authority and veto power. Only one A can be assigned to a function/activity/process.
S - Support - Support is needed from this individual in order for the accountability to be successfully carried out.
C - Consult - The individuals to be consulted prior to a final decision or action. This incorporates two-way communication.
I - Inform - The individuals who need to be informed after a decision or action is take. This incorporates one-way communication.

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	Category Manager	Category Commercial Specialist	Category Business Analyst/SME	Strategic Sou
Accountabilities				

Team Charter Template

Introduction

The charter can include the following sections as relevant to the team's situation.

1. Purpose and Governance

(Describe the purpose for forming the team and the anticipated outcomes, along with establishing the team's authority relative to the organizational purpose.)

2. Background

(Summarize the program or project the team is supporting, state how the team fits within the organizational structure, identify who are the users/customers of the program/project including external customers and stakeholders.)

3. Scope

(State the scope, mission, vision, and objectives for team. Define the high level goals the team must accomplish.)

4. Team composition

(Identify the functional areas and organizational components represented, the number of members from each, state who are core [essential] members versus support or advisory members and full or part time designation, and the anticipated time/resources commitments involved over the anticipated duration of the team.)

5. Membership roles

(Identify roles and responsibilities of each team member. List member name, contact information including telephone and email address, and team role if designated already. Also identify specific functional level of expertise associated with each member.)

6. Team empowerment

(Define existing authority the team, by virtue of its individual membership, already possesses, additional authority needed to fully perform as envisioned by the team objectives, and level of empowerment requested.)

7. Team operations

(*Describe team operational plans. This includes, for example, such activities as the team's decision-making processes, how changes in membership occur should the need arise, plans to establish "ground" or operating rules, relationships with other organizational entities or teams, logistical support, etc.)*

8. Team Performance Assessment

(Document key areas of performance needed for team success along with means of measuring progress.)

9. Milestones and schedules

(Include major activities and milestones forecasted along with associated timeframes and schedule.)

10. Signature Page

(Each team member signs, agreeing to the contents and being held mutually accountable for adherence.)

11. Approval

(Individual[s] authorized to approve the team charter, including granting the authorities requested above, signs with their approval.)

Team Status Meetings

Purpose
A regular, effective meeting is a key ingredient in having a high performance team. Try to keep this meeting short and focused: identify and assign issues for resolution but don't try to solve them in the regular team meeting. The regular team meeting serves to:
- Ensure team members know what others are working on to avoid overlaps in work
- Identify issues while they are small and easier to resolve

Suggested Regular Team Meeting Structure (Suggest 30 mins to 1 hour, weekly)

1. Short welcome to everyone; ask for any key news (social)
2. Review of last meeting's action items for a quick status update (complete or ongoing with new finish date)
3. Roundtable for new action items list
4. Issues (for capture on the flipchart and resolving in another forum).
5. Recognition for Accomplishments
6. Meeting Process feedback: Did well/Do differently

Meeting Roles and Accountabilities

Chair
- Leads meeting (Opens meeting, has final yes/no on meeting direction)

Facilitator (rotating role)
- Accountable for meeting process (how we deal with each other, how the meeting runs)
- Keeps an eye on the time spent on each part of the meeting; brings it to the attention of the chair and other participants if an item is running long
- May capture key notes on the flipchart (If the meeting is long or the items are complex, can recruit a scribe to capture notes.) Could have 3 pages: Last Meeting's Action Items; New Action Items, Issues list. These could serve as the notes or the template on page 2 can be used.
- Process checks:
    - Speaks up if we have spent too much time on one item and asks the group if they would like to move on to the rest of the meeting topics or if this is important enough for the group to divert their focus.
    - Ensures all participants have an opportunity to participate; conducts "temperature checks", e.g., "Let's hear some quick feedback from each person."
    - Ensures a small number of participants do not spend too much time on an issue not relevant to the group as a whole (general guideline: if an issue has taken more than 3-5 minutes, then it is time to ask "Should we continue on this issue or take it offline?")

- o Monitors ground rules and brings to the attention of the group if a ground rule is being violated. ("Note that one of our ground rules is that everyone have the right to participate and I am noticing that this part of the meeting is not including everyone. OR "We agreed that one of our ground rules is to clarify our decision making process. Are we at the input stage now or are we making the decision or will we be escalating?")
- o Conducts quick meeting process feedback at end of meeting. ("What did we do well this meeting? What would we do differently for next time?")
- o Ensures a set of notes is circulated in a timely way and/or the flipchart is updated and posted so that people can keep track of action items.

Participants

- Monitor own participation to be consistent with team ground rules.
- May raise a process issue if the facilitator has not yet commented.
- Accountable for own action items.

Sample Questions for Clarification of Issues

- o What is the problem? (concrete, realistic description)
- o What data do we need?
- o What people effects will this have?
- o Who will communicate what key messages to whom?

Sample Team Notes Format

Team Meeting Notes
(August 17, 2010)

Attendance		
George Archibald	Marie Dumont	Copernicus Smith
Galileo Curie (regrets)	Elizabeth King	Stan Yee

Action Items (last meeting)

1. Review reports for data accuracy (Marie) – Complete
2. Upload data to Finstrat system (Copernicus) – 50% (see issues)
3. Complete year-end post-mortem (George) – 80%
4. ....

New Action Items

1. Complete written report on year-end post-mortem (George)
2. Short list vendors for new system (Stan)
3. Hold business process requirement workshops (Galileo submitted earlier to facilitator)
4. .....

Issues

1. Data upload delayed by contractor illness, need to work a plan B (Copernicus and Elizabeth)
2. George will be away next week, need to brainstorm any gaps in coverage (George, Marie)
3. ......

Accomplishments

- Marie’s team painstakingly reviewed all data reports and corrected some significant errors (will host a coffee party on Friday in recognition.)

Did Well/Do Differently

- Kept on topic
- Went too long on issue regarding data upload
- Better donuts! These ones were stale. (Should have put on action items!)

Sample Agenda for Team Progress Checking and Forward Planning Session

Desired Outcomes

This team building session would be held after the team has had some time to work together towards its goals and would provide an opportunity to check on progress and optimize how the team is working together.

Components of this session could include:

- Introductions and introductions to anyone who has joined since the previous session
- Ice breaker activity (different from previous sessions)
- Progress Review Activity
  - Appreciative inquiry: What's working that we want to build on, acknowledging goals achieved and progress made
  - Force Field analysis: Review earlier Force Field Analysis. What progress have we made? What's moving us toward our vision and goals; what's keeping us back (identifying barriers)?
  - Reality Check
    - Are we still aligned to strategy?
    - What's changed – are we appropriately aligned or are we reacting too quickly?
- Action Plan (Items to remove barriers and build on what is working)
- Team Recognition activity
  - Acknowledge team efforts through a learning activity that is experiential and highly engaging and/or a social event
- Next Steps in Team Strategy and Planning
  - Identify next steps in planning process, set date for next session.

Handling Disagreements along the way

GRADIENTS OF AGREEMENT

ENDORSEMENT	Endorsement with a Minor Point of Contention	Agreement with Reservations	Abstain	Stand Aside	Formal Disagreement, but Willing to Go with Majority	Formal Disagreement, with Request to Be Absolved of Responsibility for Implementation	Block
"I like it."	***"Basically I like it."***	***"I can live with it."***	***"I have no opinion."***	***"I don't like this, but I don't want to hold up the group."***	***"I want my disagreement noted in writing, but I'll support the decision."***	***"I don't want to stop anyone else, but I don't want to be involved in implementing it."***	***"I veto this proposal."***

Issues/Risks

Any showstoppers?

Issues that if mitigated, would increase my level of agreement:

References

- Thanks to Jack Harrington, MCE for the Four Step Planning Framework, the handout defining Mission, Vision and Values, and the continuum for Handling Disagreements.
- Force Field Analysis is based on Kurt Lewin's original concept.
- Sample offsite agendas and meeting designs created by Nadine Ryan Bannerman.