

<b>Section 1 Introduction &amp; Basic Team Principles .....</b>	<b>5</b>
Why Successful Organizations Use Teams .....	7
4 Important Reasons Organizations Promote Teamwork .....	8
What Is A Team? .....	8
Pyramid Of Teambuilding .....	9
What Teams Need To Do .....	11
Key Concepts Of The Right Way To Manage® .....	12
Waste .....	16
4 Forms Of Waste .....	16
5 Basic Ways To Search For Waste .....	18
The Basic Mindset Of Improvement .....	21
Do You Need A Team? .....	22
Attacking The Waste: The Assault Mentality .....	23
Types Of Teams .....	25
The Challenge Of Virtual Teams .....	27
How To Decide What Kind Of Team You Need .....	28
 <b>Section 2 Process Improvement Methodology .....</b>	 <b>29</b>
The Conway Process Improvement Methodology .....	30
Convergent/Divergent Thinking .....	30
Step 1 Search For Opportunities; Decide What To Work On .....	31
Step 2 Clearly Define The Project; Select The Improvement Team .....	33
Team Charter .....	35
Problem Statement .....	40
Teams, Roles, & Responsibilities .....	43
Team Enrollment .....	47
Ground Rules .....	49
Project Plan .....	51
Project Schedule .....	52
Barriers .....	53
Step 3 Study The Current Process/Situation .....	55
Step 4 Analyze Causes; Plan The Improvement .....	56
Step 5 Carry Out The Improvement Plan .....	58
Step 6 Study The Effect Of The Changes .....	59
Step 7 Standardize The Improved Process .....	59
Step 8 Assess Progress & Plan For The Future .....	61
 <b>Section 3 Operating A Team .....</b>	 <b>63</b>
Managing Meetings .....	64
Preparing The Meeting .....	64
Conducting The Meeting .....	64
Meeting Follow-up .....	65
Ways To Keep On Schedule .....	66
Effective Communication .....	71
Graphic Communication .....	71
Written Communication .....	71
Verbal Communication .....	72
Guidelines For Effective Discussions .....	72

**Table of Contents**

---

Tips For Improving Your Communications Effectiveness ..... 73  
Non-Verbal Communication ..... 74  
Active Listening ..... 74  
Communicating Outside The Team ..... 81  
Process Check ..... 82  
Comfort Check ..... 83  
Giving & Receiving Feedback ..... 84  
Decision Making Process ..... 86  
Decision Making Tools ..... 89  
Handling Difficult Situations – Dealing With Problem Behavior ..... 92

**Section 4 Stages Of Team Development & Appreciating Differences ..... 96**

Group Development Cycle ..... 96  
Leadership 4 Group Development ..... 97  
Appreciating Differences (MBTI Preferences) ..... 98

**Section 5 Evaluating Team Effectiveness ..... 105**

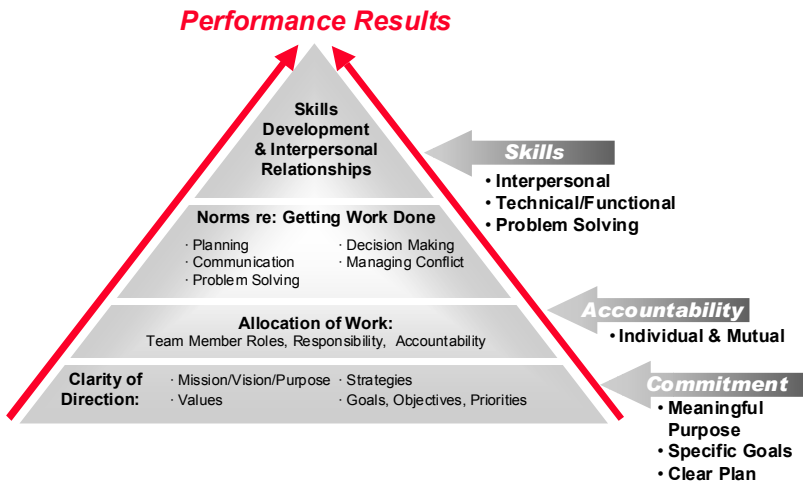
Roadmap For A New Team ..... 106  
Roadmap For A Team ..... 108  
Working With Sponsors ..... 109  
Concluding A Team ..... 111  
When & When Not To Use Teams ..... 111  
Progress Checks ..... 112  
Evaluating Project Team Effectiveness ..... 113  
Celebrate Success ..... 118  
Rewards & Recognition ..... 119  
    Non-monetary ..... 119  
    Monetary ..... 120  
    Advantages & Potential Disadvantages ..... 121  
Team Fact & Fiction ..... 122

**Section 6 Appendix ..... 123**

Guidelines  
    Conway 8 Step Methodology ..... 124  
    Brainstorming Rules ..... 124  
    Multivoting ..... 125  
Blank Forms  
    Team Charter Form ..... 126  
    Is/Is Not Matrix ..... 128  
    Team Enrollment Matrix ..... 129  
    Project Plan ..... 130  
    Data Collection Plan ..... 131  
    Project Schedule ..... 131  
    Barriers ..... 132  
    Meeting Planner ..... 133  
    Meeting Minutes ..... 134  
    Action Item Tracking ..... 135  
    Decision Tools ..... 136  
    MBTI Preferences - My 4 Letter Type ..... 137

## Pyramid Of Teambuilding

Most organizations struggle to develop high performing teams. One helpful model is the **Pyramid of Teambuilding**. The pyramid is based on the premise that building a strong foundation which is well-supported, will yield more productive efforts. It also helps to prevent the conflict which plagues many team efforts.



A strong foundation starts with building commitment to a meaningful, clearly-defined purpose. Team members need to develop answers to important questions such as:

- Why am I here?
- What are we trying to do?
- Why is this important?
- What is the plan for accomplishing the mission?
- What knowledge and skills do I contribute to the effort?

Once the team has agreed on the mission and plan, they need to clearly define their individual roles and responsibilities. Role clarity is critical to make sure that tasks and functions are accomplished without stepping on one another's toes and that things don't fall through the cracks. In this step, members answer the questions:

- Who is going to do what?
- What do we expect the leader to do?
- What do we expect the sponsor to do?

## **Do You Need A Team?**

The first question you need to ask yourself when an issue or opportunity arises is, “Do I need a team to address this?” The benefits of using a team are usually substantial, but teams also use a considerable number of resources and are not the only approach to every situation. Here are some questions you can ask when you are faced with this decision.

**If you can answer yes to each of these questions, a team may be a good choice:**

- Does the issue have an impact on many stakeholders, including customers or suppliers?
- Will their input, involvement and commitment be required if an effective solution is to be found and implemented?
- Are the necessary knowledge and skills to address the situation spread among many people?
- Is the diversity of perspectives likely to provide a more robust and effective solution?
- Do you have the necessary time and resources to use a team?
- Will the benefits outweigh the costs?

If the task or issue does not meet these guidelines, an individual contributor may take the lead on it, involving others as necessary.

### 3. Defined By An Ongoing Charter

	<b>Required By Statute</b>	<b>Emergency Response</b>	<b>Voluntary</b>	<b>Steering Committee</b>
<b>Purpose</b>	Deal with pre-determined issues	Deal with unexpected crisis	Organize activities which can involve all employees	Provide ongoing direction and priority setting for a group of activities
<b>Duration</b>	Indefinite	Duration of crisis	Indefinite	Indefinite
<b>Example</b>	Occupational Safety & Health	Chemical spill team	Social committee	CI, Steering Team
<b>Sponsor</b>	Senior manager	Senior manager	Manager with financial resources	CEO
<b>Leader</b>	Site manager	Local manager	Anyone willing	CEO
<b>Members</b>	Labor and management representatives	People with technical expertise	Anyone willing	Representatives from major functional areas and the work force/union

### **The Challenge Of Virtual Teams**

Most teams are able to meet face-to-face to get their work done. But many teams have members in several geographic locations. These teams are sometimes called “virtual” teams because they do not meet face-to-face with the same frequency as do other teams.

Although virtual teams do not differ from other teams in terms of charter, roles, work to be accomplished, performance measures, etc., they need extra attention in the area of communication, whether at meetings or between meetings. The team leader needs to ensure that members at remote locations are fully informed of team activities and that they have ways of providing input and receiving feedback.

The background of the slide features a repeating pattern of light gray interlocking puzzle pieces scattered across a fine, light gray grid. The puzzle pieces are of various orientations and positions, creating a textured, geometric background.

## ***Section 4***

# ***Stages Of Team Development & Appreciating Differences***

## Roadmap For A New Team

Here is an outline of what a new team can expect. Most of the emphasis is placed on the start-up period, which is a critical stage in the life of the team.

<b>Step</b>	<b>Agenda Item</b>	<b>Responsibility</b>
<b>1. Getting Started</b>	• Welcome and reason for the team	Sponsor
	• Review draft charter and problem statement and finalize with sponsor	Leader
	• Develop ground rules	Facilitator
	• Discuss effective meeting management	Leader
	• Review of team basics and methodology	Facilitator
	• Agree on roles & responsibilities	Leader
	• Assign action items	Leader with team
	• Process check	Facilitator
	• Complete team enrollment matrix	Leader with team
	• Draft agenda for next meeting	Leader with facilitator
<b>2. Project Plan</b>	• Ice breaker	Facilitator
	• Team building exercise (e.g., survival simulation)	Leader with team
	• Establish where the team is on the roadmap	Leader with team
	• Discuss data available	Leader with team
	• Develop project plan and schedule: who/what/by when	Leader with team
	• Assign action items	Leader with team
	• Draft agenda for next meeting	Leader with facilitator
	• Process check	Facilitator
<b>3. Data Collection &amp; Analysis (likely several meetings)</b>	• Ice breaker	Facilitator
	• Analyze process including:	Leader with team
	- customer/supplier requirements	
	- flowcharts and work analysis	
	- performance measures (process & results measures)	
	- data gathering and analysis (cause & effect and Pareto analysis)	
	- pinpoint problems and their reasons	
	- conduct root cause analysis	
- review of "best practices"		

**Assessment**

1: describes our team poorly

5: describes our team well

<b>Dimension</b>	<b>Component</b>	
<b>Focus</b>	• We have a clear, meaningful purpose and charter	_____
	• Our charter provides clear expectations, scope and boundaries	_____
	• There are clear performance objectives	_____
	• Measures of performance are clear, specific and tied to objectives	_____
	• We have a project plan to achieve results	_____
	• There is active visible support from senior management	_____
	• We are aligned within the team and with our customers	_____
<b>Team Processes</b>	• We have established and agreed to our roles & responsibilities and our behavior norms (ground rules, code of conduct)	_____
	• We have open communications:	
	within the team	_____
	with the sponsor	_____
	with customers	_____
	• We follow defined ways to make decisions	_____
	• We resolve conflict promptly	_____
	• We periodically evaluate our team performance and take action for improvement	_____
	• We have the right mix of people, skills and knowledge	_____
	• We hold ourselves mutually accountable for results	_____
• Our team has strong leadership	_____	
• We use our time efficiently and effectively	_____	
<b>Improvement Processes</b>	• We have technical knowledge of subjects being addressed	_____
	• We use systematic methods of analysis, based on facts, data and a process improvement methodology	_____
	• We have the ability to develop breakthrough solutions	_____
	• We have access to appropriate technologies	_____
	• We have the authority to implement changes	_____
<b>Achievement</b>	• We meet our deadlines/milestones/targets	_____
	• We deliver measurable results	_____
	• Our customers are satisfied	_____
	• We take pride in accomplishment	_____
	• Management visibly recognizes our accomplishments	_____

**Total Points** \_\_\_\_\_



## **Advantages And Potential Disadvantages**

Each type of recognition has potential benefits and potential drawbacks. Here are some things to consider when deciding on what makes sense.

### **Monetary**

#### **Advantages**

Can induce people to put in a lot of effort

Builds alignment

Gain-sharing ties the interests of the organization to the individual and will be appreciated

#### **Drawbacks**

May encourage the wrong behaviors, e.g., hoarding good ideas; doing what will get the money instead of what is right for the organization

Serious demotivator if the wrong people get rewarded, if only a few contribute, or if deserving people are overlooked

If the reward is tied to the amount of the gain, accounting calculations can be time-consuming and the source of disputes

### **Non-Monetary**

#### **Advantages**

Accomplishment and recognition are very strong motivators.

Monetary rewards are often unnecessary.

The consequences of recognizing the wrong people or overlooking deserving people is much less

Can be tailored to the preferences of the individual

Can be immediate

#### **Drawbacks**

People may feel that they should have received a share of the benefit to the company, if the improvement was substantial.

## Fact & Fiction

There are many myths about teams and teamwork. High performing teams are not the natural state of any team. The hard truth is that helping teams to become high performing is time consuming, maddening, exhilarating, exhausting and wonderful...all at the same time. Here are some common myths along with the reality.

<b>Myth</b>	<b>Reality</b>
<ul style="list-style-type: none"> <li>• Teamwork comes naturally to people</li> </ul>	<ul style="list-style-type: none"> <li>• Society and many organizations primarily value and reward individual accomplishment and competitiveness</li> </ul>
<ul style="list-style-type: none"> <li>• Everyone wants to be on a team</li> </ul>	<ul style="list-style-type: none"> <li>• Significant numbers of people have no interest               <ul style="list-style-type: none"> <li>- teams waste time</li> <li>- teams do not come up with good solutions</li> <li>- individuals are worried about what they don't know and how their participation will impact their job</li> </ul> </li> </ul>
<ul style="list-style-type: none"> <li>• Teams do most of their work in meetings</li> </ul>	<ul style="list-style-type: none"> <li>• Team members and sub-teams must gather data and complete assignments outside of meetings</li> </ul>
<ul style="list-style-type: none"> <li>• An effective team will produce good results</li> </ul>	<ul style="list-style-type: none"> <li>• Teams need to be working on the right things</li> <li>• Organizations have many built-in obstacles to implementation</li> <li>• The culture of the organization does not always encourage and reinforce teamwork</li> </ul>
<ul style="list-style-type: none"> <li>• Common purpose and goals ensure good results</li> </ul>	<ul style="list-style-type: none"> <li>• Goals are only part of the equation: effective problem-solving, analytical methods, technical and interpersonal skills must be learned and applied systematically</li> <li>• Teams must make visible to themselves what they are doing and how they are going to do it</li> </ul>
<ul style="list-style-type: none"> <li>• Once we have committed to using teams, all problems should be solved by teams</li> </ul>	<ul style="list-style-type: none"> <li>• Many problems do not require teams:               <ul style="list-style-type: none"> <li>- "technical expert" solution needed</li> <li>- one person could do it</li> <li>- boss had already decided the answer</li> </ul> </li> </ul>
<ul style="list-style-type: none"> <li>• Facilitation is a luxury</li> </ul>	<ul style="list-style-type: none"> <li>• Facilitation is critical until teamwork skills and the environment for success are built</li> </ul>

### Data Collection Plan

	Specific Data & Amt. Required	Available Yes/No	Where To Get	Who	Time Required	Chart To Be Used
<ul style="list-style-type: none"> <li>◆ <b>Overall Results Measures:</b>                      _____                      _____                      _____</li> <li>◆ <b>Process Measures:</b>                      _____                      _____                      _____</li> <li>◆ <b>Quality Measures:</b>                      _____                      _____                      _____</li> <li>◆ <b>Process Flow Chart (as is):</b></li> <li>◆ <b>Other Related Data (specify):</b>                      _____                      _____                      _____</li> </ul>						

### Project Schedule

Step \ Week/ Month	Week/ Month									
	1	2	3	4	5	6	7	8	9	10
Study the current process/situation										
Analyze causes										
Plan the improvement										
Carry out the improvement plan										
Study the effect of the changes										
Standardize the improved process										

Plan = ○ — ○  
 Actual = ● — ●