Leadership and Management Skills

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A. LEADERSHIP VS. MANAGEMENT

What is the difference between management and leadership? The biggest difference between managers and leaders is the way they motivate the people who work or follow them, and this sets the tone for most other aspects of what they do.
Many people, by the way, are both. They have management jobs, but they realize that you cannot buy hearts, especially to follow them down a difficult path, and so act as leaders too.

1. Managers have subordinates

By definition, managers have subordinates - unless their title is honorary and given as a mark of seniority, in which case the title is a misnomer and their power over others is other than formal authority.

Authoritarian, transactional style
Managers have a position of authority vested in them by the company, and their subordinates work for them and largely do as they are told. Management style is transactional, in that the manager tells the subordinate what to do, and the subordinate does this not because they are a blind robot, but because they have been promised a reward (at minimum their salary) for doing so.

Work focus
Managers are paid to get things done (they are subordinates too), often within tight constraints of time and money. They thus naturally pass on this work focus to their subordinates.

Seek comfort
An interesting research finding about managers is that they tend to come from stable home backgrounds and led relatively normal and comfortable lives. This leads them to be relatively risk-averse and they will seek to avoid conflict where possible. In terms of people, they generally like to run a 'happy ship'.

2. Leaders have followers

Leaders do not have subordinates - at least not when they are leading. Many organizational leaders do have subordinates, but only because they are also managers. But when they want to lead, they have to give up formal authoritarian control, because to lead is to have followers, and following is always a voluntary activity.

Charismatic, transformational style

Telling people what to do does not inspire them to follow you. You have to appeal to them, showing how following them will lead to their hearts' desire. They must want to follow you enough to stop what they are doing and perhaps walk into danger and situations that they would not normally consider risking.

Leaders with a stronger charisma find it easier to attract people to their cause. As a part of their persuasion they typically promise transformational benefits, such that their followers will not just receive extrinsic rewards but will somehow become better people.

People focus

Although many leaders have a charismatic style to some extent, this does not require a loud personality. They are always good with people, and quiet styles that give credit to others (and takes blame on themselves) are very effective at creating the loyalty that great leaders engender.

Although leaders are good with people, this does not mean they are friendly with them. In order to keep the mystique of leadership, they often retain a degree of separation and aloofness.

This does not mean that leaders do not pay attention to tasks - in fact they are often very achievement-focused. What they do realize, however, is the importance of enthusing others to work towards their vision.

Seek risk

In the same study that showed managers as risk-averse, leaders appeared as risk-seeking, although they are not blind thrill-seekers. When pursuing their vision, they consider it natural to encounter problems and hurdles that must be overcome along the way. They are thus comfortable with risk and will see routes that others avoid as potential opportunities for advantage and will happily break rules in order to get things done.

In summary

This table summarizes the above (and more) and gives a sense of the differences between being a leader and being a manager. This is, of course, an illustrative characterization, and there is a whole spectrum between either ends of these scales along which each role can range. And many people lead and manage at the same time, and so may display a combination of behaviors.

Subject	Leader	Manager
Essence	Change	Stability
Focus	Leading people	Managing work
Have	Followers	Subordinates
Horizon	Long term	Short term
Seeks	Vision	Objectives
Approach	Sets direction	Plans detail
Decision	Facilitates	Makes
Power	Personal charisma	Formal authority
Appeal to	Heart	Head
Energy	Passion	Control
Culture	Shapes	Enacts
Dynamic	Proactive	Reactive
Persuasion	Sell	Tell
Style	Transformational	Transactional
Exchange	Excitement for work	Money for work
Likes	Striving	Action
Wants	Achievement	Results
Risk	Takes	Minimizes
Rules	Breaks	Makes
Conflict	Uses	Avoids
Direction	New roads	Existing roads
Truth	Seeks	Establishes
Concern	What is right	Being right
Credit	Gives	Takes
Blame	Takes	Blames

Persuasion principles

Much of persuasion and other forms of changing minds is based on a relatively small number of principles. If you can understand the principles, then you can invent your own techniques. It thus makes sense to spend time to understand these principles (persuaded yet?).

B. PROBLEM SOLVING

Much of what managers and supervisors do is solve problems and make decisions. New managers and supervisors, in particular, often solve problems and decisions by reacting to them. They are "under the gun", stressed and very short for time. Consequently, when they encounter a new problem or decision they must make, they react with a decision that seemed to work before. It's easy with this approach to get stuck in a circle of solving the same problem over and over again. Therefore, as a new manager or supervisor, get used to an organized approach to problem solving and decision making. Not all problems can be solved and decisions made by the following, rather rational approach. However, the following basic guidelines will get you started. Don't be intimidated by the length of the list of guidelines. After you've practiced them a few times, they'll become second nature to you -- enough that you can deepen and enrich them to suit your own needs and nature.

1. Define the problem

This is often where people struggle. They react to what they think the problem is. Instead, seek to understand more about why you think there's a problem.

Defining the problem: (with input from yourself and others)

Ask yourself and others, the following questions:

1. What can you see that causes you to think there's a problem?
2. Where is it happening?
3. How is it happening?
4. When is it happening?
5. With whom is it happening? (HINT: Don't jump to "Who is causing the problem?" When we're stressed, blaming is often one of our first reactions. To be an effective manager, you need to address issues more than people.)
6. Why is it happening?
7. Write down a five-sentence description of the problem in terms of "The following should be happening, but isn't ..." or "The following is happening and should be: ..." As much as possible, be specific in your description, including what is happening, where, how, with whom and why. (It may be helpful at this point to use a variety of research methods.

Defining complex problems:

If the problem still seems overwhelming, break it down by repeating steps a-f until you have descriptions of several related problems.

Verifying your understanding of the problems:

It helps a great deal to verify your problem analysis for conferring with a peer or someone else.

Prioritize the problems:

1. If you discover that you are looking at several related problems, then prioritize which ones you should address first.
2. Note the difference between "important" and "urgent" problems. Often, what we consider to be important problems to consider are really just urgent problems. Important problems deserve more attention. For example, if you're continually answering "urgent" phone calls, then you've probably got a more "important" problem and that's to design a system that screens and prioritizes your phone calls.

Understand your role in the problem:

Your role in the problem can greatly influence how you perceive the role of others. For example, if you're very stressed out, it'll probably look like others are, too, or, you may resort too quickly to blaming and reprimanding others. Or, you are feel very guilty about your role in the problem, you may ignore the accountabilities of others.

3. Look at potential causes for the problem

   a. It's amazing how much you don't know about what you don't know. Therefore, in this phase, it's critical to get input from other people who notice the problem and who are effected by it.
   b. It's often useful to collect input from other individuals one at a time (at least at first). Otherwise, people tend to be inhibited about offering their impressions of the real causes of problems.
   c. Write down what your opinions and what you've heard from others.
   d. Regarding what you think might be performance problems associated with an employee, it's often useful to seek advice from a peer or your supervisor in order to verify your impression of the problem.
   e. Write down a description of the cause of the problem and in terms of what is happening, where, when, how, with whom and why.

4. Identify alternatives for approaches to resolve the problem

At this point, it's useful to keep others involved (unless you're facing a personal and/or employee performance problem). Brainstorm for solutions to the problem. Very

simply put, brainstorming is collecting as many ideas as possible, then screening them to find the best idea. It's critical when collecting the ideas to not pass any judgment on the ideas -- just write them down as you hear them.

5. Select an approach to resolve the problem

When selecting the best approach, consider:

a. Which approach is the most likely to solve the problem for the long term?
b. Which approach is the most realistic to accomplish for now? Do you have the resources? Are they affordable? Do you have enough time to implement the approach?
c. What is the extent of risk associated with each alternative? (The nature of this step, in particular, in the problem solving process is why problem solving and decision making are highly integrated.)

6. Plan the implementation of the best alternative (this is your action plan)

a. Carefully consider "What will the situation look like when the problem is solved?"
b. What steps should be taken to implement the best alternative to solving the problem? What systems or processes should be changed in your organization, for example, a new policy or procedure? Don't resort to solutions where someone is "just going to try harder".
c. How will you know if the steps are being followed or not? (these are your indicators of the success of your plan)
d. What resources will you need in terms of people, money and facilities?
e. How much time will you need to implement the solution? Write a schedule that includes the start and stop times, and when you expect to see certain indicators of success.
f. Who will primarily be responsible for ensuring implementation of the plan?
g. Write down the answers to the above questions and consider this as your action plan.
h. Communicate the plan to those who will involved in implementing it and,

at least, to your immediate supervisor. (An important aspect of this step in the problem-solving process is continually observation and feedback.)

7. Monitor implementation of the plan

Monitor the indicators of success:

1. Are you seeing what you would expect from the indicators?
2. Will the plan be done according to schedule?
3. If the plan is not being followed as expected, then consider: Was the plan realistic? Are there sufficient resources to accomplish the plan on schedule? Should more priority be placed on various aspects of the plan? Should the plan be changed?

8. Verify if the problem has been resolved or not

One of the best ways to verify if a problem has been solved or not is to resume normal operations in the organization. Still, you should consider:

a. What changes should be made to avoid this type of problem in the future?
b. Consider changes to policies and procedures, training, etc.
c. Lastly, consider "What did you learn from this problem solving?" Consider new knowledge, understanding and/or skills.
d. Consider writing a brief memo that highlights the success of the problem solving effort, and what you learned as a result. Share it with your supervisor, peers and subordinates.

C. DECISION MAKING

1. Introduction to Decision Making Techniques

All of us have to make decisions every day. Some decisions are relatively straightforward and simple:Others are quite complex: Which of these candidates should I select for the job?

Simple decisions usually need a simple decision-making process. But difficult decisions typically involve issues like these:

- Uncertainty - Many facts may not be known.
- Complexity - You have to consider many interrelated factors.
- High-risk consequences - The impact of the decision may be significant.
- Alternatives - Each has its own set of uncertainties and consequences.
- Interpersonal issues - It can be difficult to predict how other people will react.

With these difficulties in mind, the best way to make a complex decision is to use an effective process. Clear processes usually lead to consistent, high-quality results, and they can improve the quality of almost everything we do. In this article, we outline a process that will help improve the quality of your decisions.

2. A Systematic Approach to Decision Making

A logical and systematic decision-making process helps you address the critical elements that result in a good decision. By taking an organized approach, you're less likely to miss important factors, and you can build on the approach to make your decisions better and better.

There are six steps to making an effective decision:

Step 1: Create a constructive environment

To create a constructive environment for successful decision making, make sure you do the following:

- Establish the objective - Define what you want to achieve.
- Agree on the process - Know how the final decision will be made, including whether it will be an individual or a team-based decision.
- Involve the right people - Where a group process is appropriate, the decision-making

group - typically a team of five to seven people - should have a good representation of stakeholders.

• Allow opinions to be heard - Encourage participants to contribute to the discussions, debates, and analysis without any fear of rejection from the group. This is one of the best ways to avoid group think. The Stepladder Technique is a useful method for gradually introducing more and more people to the group discussion, and making sure everyone is heard. Also, recognize that the objective is to make the best decision under the circumstances: it's not a game in which people are competing to have their own preferred alternatives adopted.

The Stepladder Technique :

Step 1: Before getting together as a group, present the task or problem to all members. Give everyone sufficient time to think about what needs to be done and to form their own opinions on how to best accomplish the task or solve the problem.

Step 2: Form a core group of two members. Have them discuss the problem.

Step 3: Add a third group member to the core group. The third member presents ideas to the first two members BEFORE hearing the ideas that have already been discussed. After all three members have laid out their solutions and ideas, they discuss their options together.

Step 4: Repeat the same process by adding a fourth member, and so on, to the group. Allow time for discussion after each additional member has presented his or her ideas.

Step 5: Reach a final decision only after all members have been brought in and presented their

- Make sure you're asking the right question - Ask yourself whether this is really the true issue. The 5 Whys technique is a classic tool that helps you identify the real underlying problem that you face.
- Use creativity tools from the start - The basis of creativity is thinking from a different perspective. Do this when you first set out the problem, and then continue it while generating alternatives. Generate new ideas.

Step 2: Generate Good Alternatives

This step is still critical to making an effective decision. The more good options you consider, the more comprehensive your final decision will be.

When you generate alternatives, you force yourself to dig deeper, and look at the problem from different angles. If you use the mindset 'there must be other solutions out there,' you're more likely to make the best decision possible. If you don't have reasonable alternatives, then there's really not much of a decision to make!

Here's a summary of some of the key tools and techniques to help you and your team develop good alternatives.

1. Generating Ideas

• Brainstorming is probably the most popular method of generating ideas.
• Another approach, Reverse Brainstorming, works similarly. However, it starts by asking people to brainstorm how to achieve the opposite outcome from the one wanted, and then reversing these actions.
• The Charette Procedure is a systematic process for gathering and developing ideas from very many stakeholders.
• Everyone's ideas should be heard and given equal weight, irrespective of the person's position or power within the organization.

2. Considering Different Perspectives
• The Reframing Matrix uses 4 Ps (product, planning, potential, and people) as the basis for gathering different perspectives. You can also ask outsiders to join the discussion, or ask existing participants to adopt different functional perspectives (for example, have a marketing person speak from the viewpoint of a financial manager).
• If you have very few options, or an unsatisfactory alternative, use a Concept Fan to take a step back from the problem, and approach it from a wider perspective. This often helps when the people involved in the decision are too close to the problem.
• Appreciative Inquiry forces you to look at the problem based on what's 'going right,' rather than what's 'going wrong.'

3. Organizing Ideas
This is especially helpful when you have a large number of ideas. Sometimes separate ideas can be combined into one comprehensive alternative.
a. Use Affinity Diagrams to organize ideas into common themes and groupings.

Group Brainstorming

1. Find a comfortable meeting environment, and set it up ready for the session.
2. Appoint one person to record the ideas that come from the session. These should be noted in a format than everyone can see and refer to. Depending on the approach you want to use, you may want to record ideas on flip charts, whiteboards, or computers with data projectors.

3. If people aren't already used to working together, consider using an appropriate warm-up exercise or ice-breaker.
4. Define the problem you want solved clearly, and lay out any criteria to be met. Make it clear that that the objective of the meeting is to generate as many ideas as possible.
5. Give people plenty of time on their own at the start of the session to generate as many ideas as possible.
6. Ask people to give their ideas, making sure that you give everyone a fair opportunity to contribute.
7. Encourage people to develop other people's ideas, or to use other ideas to create new ones.
8. Encourage an enthusiastic, uncritical attitude among members of the group. Try to get everyone to contribute and develop ideas, including the quietest members of the group.
9. Ensure that no one criticizes or evaluates ideas during the session. Criticism introduces an element of risk for group members when putting forward an idea. This stifles creativity and cripples the free running nature of a good brainstorming session.
10. Let people have fun brainstorming. Encourage them to come up with as many ideas as possible, from solidly practical ones to wildly impractical ones. Welcome creativity!
11. Ensure that no train of thought is followed for too long. Make sure that you generate a sufficient number of different ideas, as well as exploring individual ideas in detail.
12. In a long session, take plenty of breaks so that people can continue to concentrate.

Reverse Brainstorming

1. Clearly identify the problem or challenge, and write it down.
2. Reverse the problem or challenge by asking:
   "How could I possibly cause the problem?", or
   "How could I possibly achieve the opposite effect?"
3. Brainstorm the reverse problem to generate reverse solution ideas. Allow the brainstorm ideas to flow freely. Do not reject anything at this stage.
4. Once you have brainstormed all the ideas to solve the reverse problem, now reverse these into solution ideas for the original problem or challenge.
5. Evaluate these solution ideas. Can you see a potential solution? Can you see attributes of a potential solution?

Charette Procedure

0 Agree on a set of issues that need to be discussed.

0 Divide your larger group into small groups that are conducive to brainstorming. As with many types of group interaction, a group size of seven participants plus the recorder is ideal. Here again, the specifics of your situation will dictate the size of your groups. When planning the groups, consider the following:

- If you have a set deadline, make sure the number of groups and iterations can be accommodated.
- Think about the mix of people within the groups. Groups with a diverse mix of skills, background and experience are generally more creative than those of similarly skilled people.
- Make sure the number of groups is equal to or greater than the number of issues to discuss.

0 Assign an issue to each group. If there are more groups than issues, then assign some issues to more than one group.

0 Have each group elect a recorder. You may also suggest this person facilitates the group discussion as well.

o Each group brainstorms an issue.

- Record all ideas, as for regular brainstorming. Click the link to find out more about the regular brainstorming process.
- Set a time limit for discussion. This will depend heavily on your overall schedule as well as the complexity of the issues being discussed. Strike a balance between too short a session that might not uncover enough detail, and longer discussions that might lose focus

0 When the group's time is up, the recorder moves to the next group.

- The recorder reviews the issues and current state of the brainstorming list with the new group.
- Brainstorming begins again, with each group now discussing a new idea or issue. The new group builds on the existing ideas and generates new one.
- Repeat this step until each group has discussed each issue once.

0 In the final group session, allow time to organize and draw together the ideas into key ideas, themes or strands. If several groups have been working at the same time on the same issue, this is a good time to bring together the different streams of ideas.

0 Once the final session has finished, reconvene the whole group and have the recorders present their lists. This is a good time to work with the group to prioritize issues or approaches, if this is appropriate. Techniques that can help you with this are:

The 4 Ps Approach

This relies on looking at a problem from different perspectives within a business. The 4 Ps approach looks at problems from the following viewpoints:

- Product perspective: Is there something wrong with the product?
- Planning perspective: Are our business plans or marketing plans at fault?
- Potential perspective: If we were to seriously increase our targets, how would we achieve these increases?
- People perspective: Why do people choose one product over another?

A Concept Fan

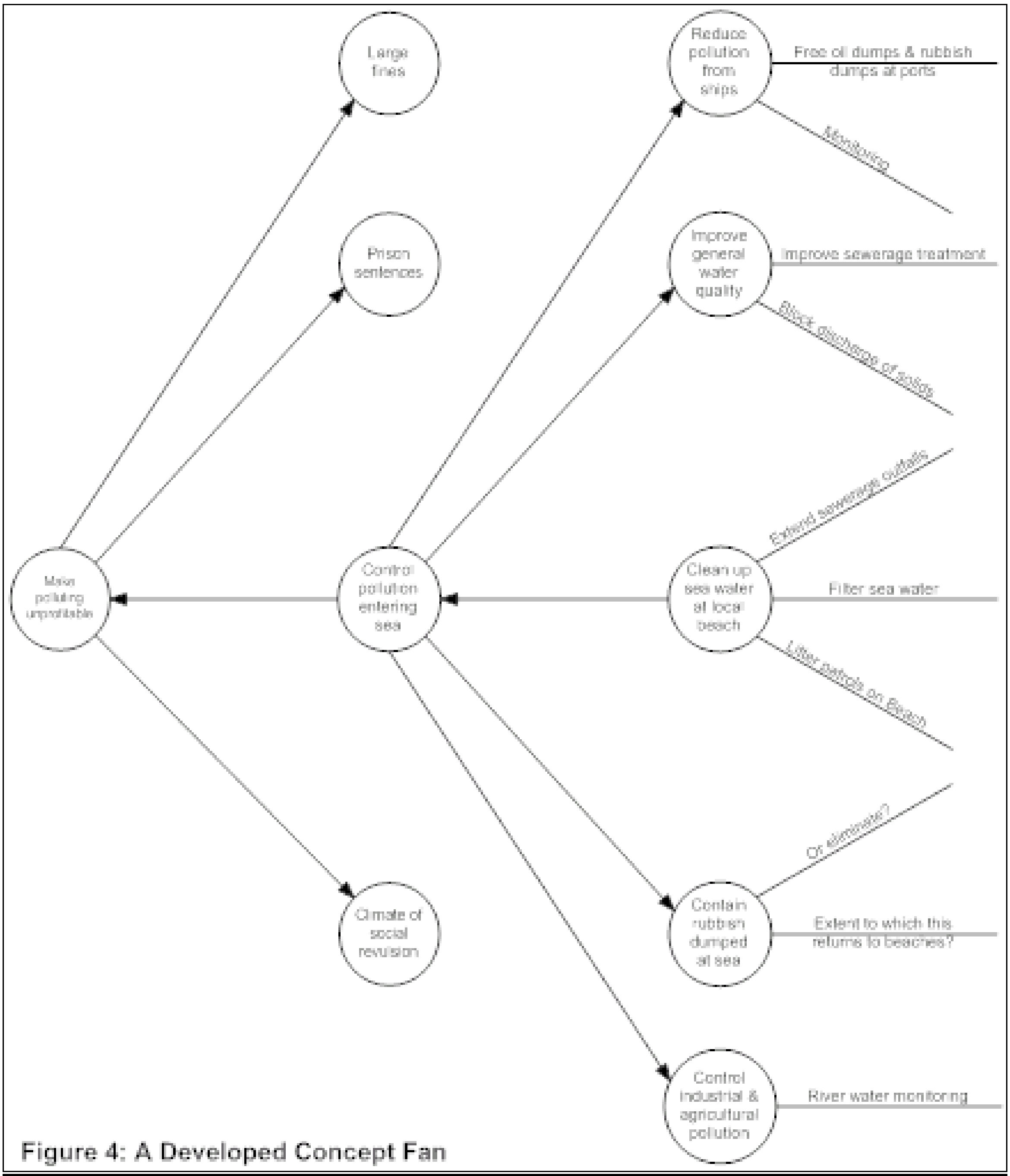
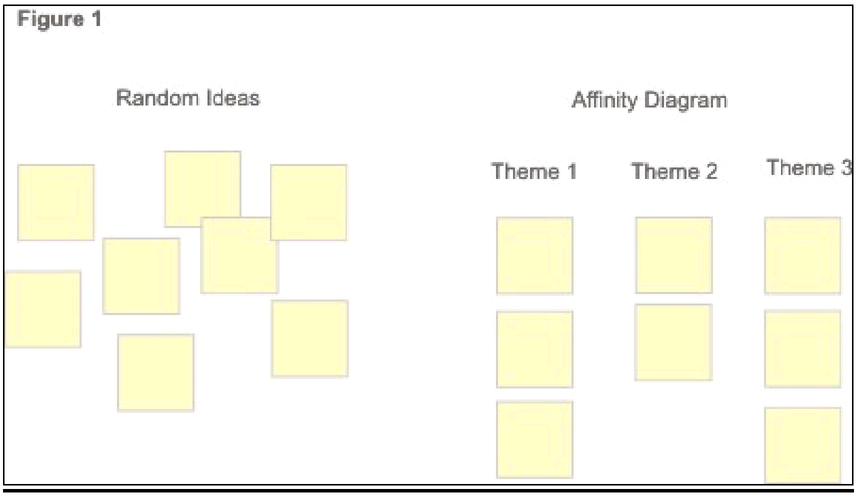


Figure 4: A Developed Concept Fan

Affinity Diagram



Affinity diagrams can be used to:

- *Draw out common themes from a large amount of information.*
- *Discover previously unseen connections between various ideas or information.*
- *Brainstorm root causes and solutions to a problem.*

Step 3: Explore the Alternatives

When you're satisfied that you have a good selection of realistic alternatives, then you'll need to evaluate the feasibility, risks, and implications of each choice. Here, we discuss some of the most popular and effective analytical tools.

1. Risk
   • In decision making, there's usually some degree of uncertainty, which inevitably leads to risk. By evaluating the risk involved with various options, you can determine whether the risk is manageable.
   • Risk Analysis helps you look at risks objectively. It uses a structured approach for assessing threats, and for evaluating the probability of events occurring - and what they might cost to manage.
2. Implications
   • Another way to look at your options is by considering the potential consequences of each.
   • Six Thinking Hats helps you evaluate the consequences of a decision by looking at the alternatives from six different perspectives.
   • Impact Analysis is a useful technique for brainstorming the 'unexpected'

consequences that may arise from a decision.

3. Validation

• Determine if resources are adequate, if the solution matches your objectives, and if the decision is likely to work in the long term.

a. Starbursting helps you think about the questions you should ask to evaluate an alternative properly.
b. To assess pros and cons of each option, use Force Field Analysis, or use the Plus-Minus-Interesting approach.
c. Cost-Benefit Analysis looks at the financial feasibility of an alternative.

Risk Analysis

To carry out a risk analysis, follow these steps:

1. Identify Threats:

The first stage of a risk analysis is to identify threats facing you. Threats may be:

- Human - from individuals or organizations, illness, death, etc.
- Operational - from disruption to supplies and operations, loss of access to essential assets, failures in distribution, etc.
- Reputational - from loss of business partner or employee confidence, or damage to reputation in the market.
- Procedural - from failures of accountability, internal systems and controls, organization, fraud, etc.
- Project - risks of cost over-runs, jobs taking too long, of insufficient product or service quality, etc.
- Financial - from business failure, stock market, interest rates, unemployment, etc.
- Technical - from advances in technology, technical failure, etc.
- Natural - threats from weather, natural disaster, accident, disease, etc.
- Political - from changes in tax regimes, public opinion, government policy, foreign influence, etc.
- Others - Porter's Five Forces analysis may help you identify other risks.
  This analysis of threat is important because it is so easy to overlook important threats. One way of trying to capture them all is to use a number of different approaches:
- Firstly, run through a list such as the one above, to see if any apply
- Secondly, think through the systems, organizations or structures you operate, and analyze risks to any part of those
- See if you can see any vulnerabilities within these systems or structures

- Ask other people, who might have different perspectives.

2. Estimate Risk:

Once you have identified the threats you face, the next step is to work out the likelihood of the threat being realized and to assess its impact.
One approach to this is to make your best estimate of the probability of the event occurring, and to multiply this by the amount it will cost you to set things right if it happens. This gives you a value for the risk.

3. Managing Risk:

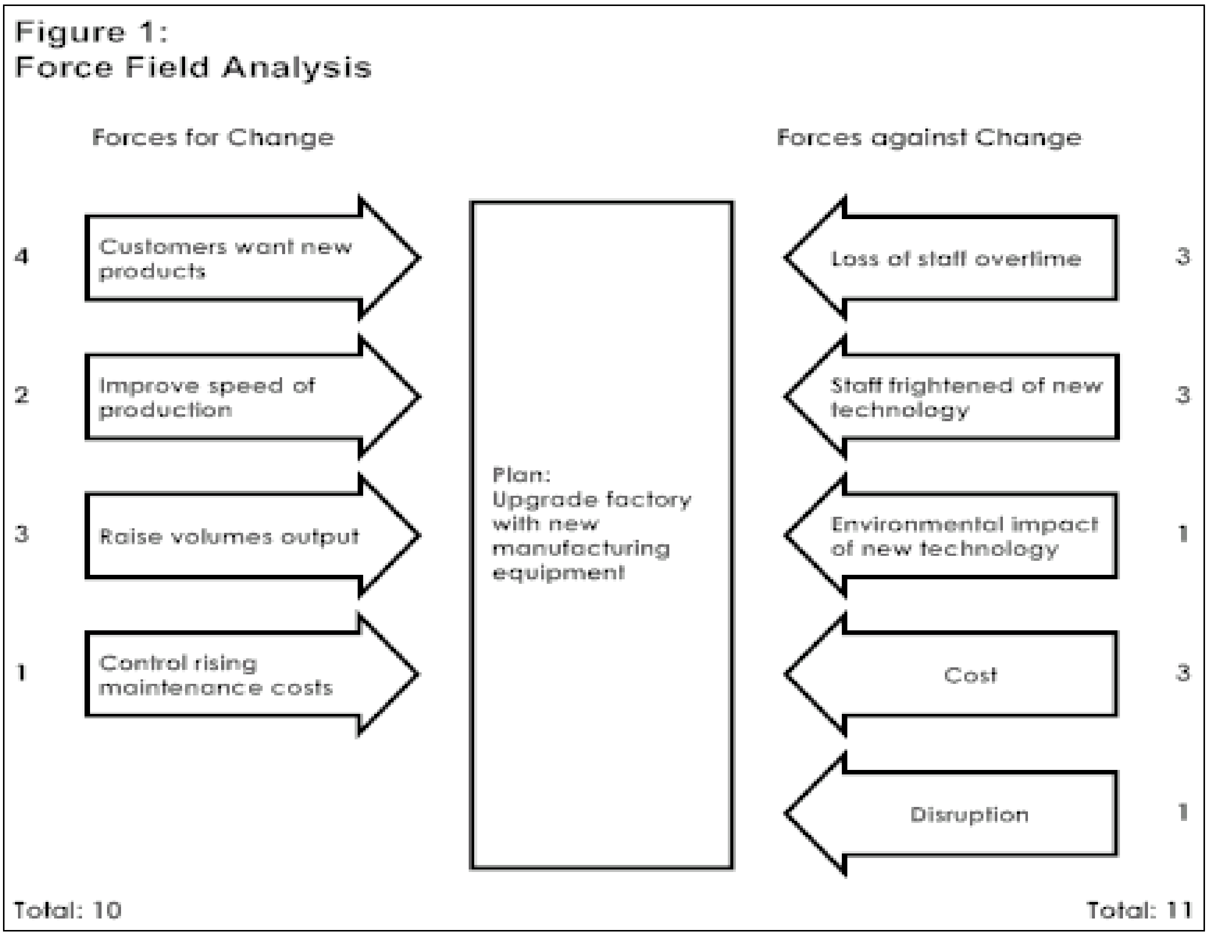
Once you have worked out the value of risks you face, you can start to look at ways of managing them. When you are doing this, it is important to choose cost effective approaches - in most cases, there is no point in spending more to eliminating a risk than the cost of the event if it occurs. Often, it may be better to accept the risk than to use excessive resources to eliminate it.
Risk may be managed in a number of ways:

- By using existing assets:
  Here existing resources can be used to counter risk. This may involve improvements to existing methods and systems, changes in responsibilities, improvements to accountability and internal controls, etc.
- By contingency planning:
  You may decide to accept a risk, but choose to develop a plan to minimize its effects if it happens. A good contingency plan will allow you to take action immediately, with the minimum of project control if you find yourself in a crisis management situation. Contingency plans also form a key part of Business Continuity Planning (BCP) or Business Continuity management (BCM).
- By investing in new resources:
  Your risk analysis should give you the basis for deciding whether to bring in additional resources to counter the risk. This can also include insuring the risk: Here you pay someone else to carry part of the risk - this is particularly important where the risk is so great as to threaten your or your organization's solvency.

4. Reviews:

Once you have carried out a risk analysis and management exercise, it may be worth carrying out regular reviews. These might involve formal reviews of the risk analysis, or may involve testing systems and plans appropriately.

FORCE FIELD ANALYSIS



Step 4: Choose the Best Alternative

After you have evaluated the alternatives, the next step is to choose between them. The choice may be obvious. However, if it isn't, these tools will help:

• Grid Analysis, also known as a decision matrix, is a key tool for this type of evaluation. It's invaluable because it helps you bring disparate factors into your decision-making process in a reliable and rigorous way.

• Use Paired Comparison Analysis to determine the relative importance of various factors. This helps you compare unlike factors, and decide which ones should carry the most weight in your decision.

• Decision Trees are also useful in choosing between options. These help you lay out the different options open to you, and bring the likelihood of project success or failure into the decision making process.

Step 5: Check Your Decision

With all of the effort and hard work that goes into evaluating alternatives, and deciding the best way forward, it's easy to forget to 'sense check' your decisions. This is where you look at the decision you're about to make dispassionately, to make sure that your process has been thorough, and to ensure that common errors haven't crept into the decision-making process. After all, we can all now see the catastrophic consequences that over-confidence, groupthink, and other decision-making errors have wrought on the world economy.

The first part of this is an intuitive step, which involves quietly and methodically testing the assumptions and the decisions you've made against your own experience, and thoroughly reviewing and exploring any doubts you might have.

Step 6: Communicate Your Decision, and Move to Action!

Once you've made your decision, it's important to explain it to those affected by it, and involved in implementing it. Talk about why you chose the alternative you did. The more information you provide about risks and projected benefits, the more likely people are to support the decision.

D. PLANNING

Working Backwards Through Any "System"

Before we jump into the typical phases in the standard "generic" planning process, let's stand back for a minute and briefly look at the role of planning in its overall context. This is more than an academic exercise -- understanding this overall context for planning can greatly help the reader to design and carry out the planning process in almost planning application.
One of the most common sets of activities in the management is planning. Very simply put, planning is setting the direction for something -- some system -- and then working to ensure the system follows that direction. Systems have inputs, processes, outputs and outcomes. To explain, inputs to the system include resources such as raw materials, money, technologies and people. These inputs go through a process where they're aligned, moved along and carefully coordinated, ultimately to achieve the goals set for the system. Outputs are tangible results produced by processes in the system, such as products or services for consumers. Another kind of result is outcomes, or benefits for consumers, e.g., jobs for workers, enhanced quality of life for customers, etc. Systems can be the entire organization, or its departments, groups, processes, etc.

Basically, an organization in its simplest form (and not necessarily a legal entity, e.g., corporation or LLC) is a person or group of people intentionally organized to accomplish an overall, common goal or set of goals. Business organizations can range in size from one person to tens of thousands.There are several important aspects to consider about the goal of the business organization. These features are explicit (deliberate and recognized) or implicit (operating unrecognized, "behind the scenes"). Ideally, these features are carefully considered and established, usually during the strategic planning process. (Later, we'll consider dimensions and concepts that are common to organizations.)

Vision
Members of the organization often have some image in their minds about how the organization should be working, how it should appear when things are going well.

Mission
An organization operates according to an overall purpose, or mission.

Values
All organizations operate according to overall values, or priorities in the nature of how they carry out their activities. These values are the personality, or culture, of the organization.

Strategic Goals
Organizational members often work to achieve several overall accomplishments, or goals, as they work toward their mission.

Strategies
Organizations usually follow several overall general approaches to reach their goals.

Systems and Processes that (Hopefully) Are Aligned With Achieving the Goals
Organizations have major subsystems, such as departments, programs, divisions, teams, etc. Each of these subsystems has a way of doing things to, along with other subsystems, achieve the overall goals of the organization. Often, these systems and processes are define by plans, policies and procedures. How you interpret each of the above major parts of an organization depends very much on your values and your nature. People can view organizations as machines, organisms, families, groups, etc. (We'll consider more about these metaphors later on in this topic in the library.)

Whether the system is an organization, department, business, project, etc., the process of planning includes planners working backwards through the system. They start from the results (outcomes and outputs) they prefer and work backwards through the system to identify the processes needed to produce the results. Then they identify what inputs (or resources) are needed to carry out the processes.

Goals

Goals are specific accomplishments that must be accomplished in total, or in some combination, in order to achieve some larger, overall result preferred from the system, for example, the mission of an organization. (Going back to our reference to systems, goals are outputs from the system.)

Strategies or Activities

These are the methods or processes required in total, or in some combination, to achieve the goals. (Going back to our reference to systems, strategies are processes in the system.)

Objectives

Objectives are specific accomplishments that must be accomplished in total, or in some combination, to achieve the goals in the plan. Objectives are usually "milestones" along the way when implementing the strategies.

Tasks

People are assigned various tasks required to implement the plan. If the scope of the plan is very small, tasks and activities are often essentially the same.

Resources (and Budgets)

Resources include the people, materials, technologies, money, etc., required to implement the strategies or processes. The costs of these resources are often depicted in the form of a budget.

1. Basic Overview of Typical Phases in Planning

Whether the system is an organization, department, business, project, etc., the basic planning process typically includes similar nature of activities carried out in similar sequence. The phases are carried out carefully or -- in some cases -- intuitively, for example, when planning a very small, straightforward effort. The complexity of the various phases (and their duplication throughout the system) depend on the scope of the system.

a. Reference Overall Singular Purpose ("Mission") or Desired Result from System

During planning, planners have in mind (consciously or unconsciously) some overall purpose or result that the plan is to achieve. For example, during strategic planning, it's critical to reference the mission, or overall purpose, of the organization.

b. Take Stock Outside and Inside the System

This "taking stock" is always done to some extent, whether consciously or unconsciously. For example, during strategic planning, it's important to conduct an environmental scan. This scan usually involves considering various driving forces, or major influences, that might effect the organization.

c. Analyze the Situation

For example, during strategic planning, planners often conduct a "SWOT analysis". (SWOT is an acronym for considering the organization's Strengths and Weaknesses, and the Opportunities and Threats faced by the organization.) During this analysis, planners also can use a variety of assessments, or methods to "measure" the health of systems.

d. Establish Goals

Based on the analysis and alignment to the overall mission of the system, planners establish a set of goals that build on strengths to take advantage of opportunities, while building up weaknesses and warding off threats.

e. Establish Strategies to Reach Goals

The particular strategies (or methods to reach the goals) chosen depend on matters of affordability, practicality and efficiency.

f. Establish Objectives Along the Way to Achieving Goals

Objectives are selected to be timely and indicative of progress toward goals.

g. Associate Responsibilities and Time Lines With Each Objective

Responsibilities are assigned, including for implementation of the plan, and for achieving various goals and objectives. Ideally, deadlines are set for meeting each responsibility.

h. Write and Communicate a Plan Document

The above information is organized and written in a document which is distributed around the system.

i. Acknowledge Completion and Celebrate Success

This critical step is often ignored -- which can eventually undermine the success of many of your future planning efforts. The purpose of a plan is to address a current problem or pursue a development goal. It seems simplistic to assert that you should acknowledge if the problem was solved or the goal met. However, this step in the planning process is often ignored in lieu of moving on the next problem to solve or goal to pursue. Skipping this step can cultivate apathy and skepticism -- even cynicism -- in your organization. Don't skip this step.

2. Guidelines to Ensure Successful Planning and Implementation

A common failure in many kinds of planning is that the plan is never really implemented. Instead, all focus is on writing a plan document. Too often, the plan sits collecting dust on a shelf. Therefore, most of the following guidelines help to ensure that the planning process is carried out completely and is implemented completely -- or, deviations from the intended plan are recognized and managed accordingly.

a. Involve the Right People in the Planning Process

It's critical that all parts of the system continue to exchange feedback in order to function effectively. This is true no matter what type of system. When planning, get input from everyone who will responsible to carry out parts of the plan, along with representative from groups who will be effected by the plan. Of course, people also should be involved in they will be responsible to review and authorize the plan.

b. Write Down the Planning Information and Communicate it Widely

New managers, in particular, often forget that others don't know what these managers know. Even if managers do communicate their intentions and plans verbally, chances are great that others won't completely hear or understand what the manager wants done. Also, as plans change, it's extremely difficult to remember who is supposed to be doing what and according to which version of the plan. Key stakeholders may request copies of various types of plans. Therefore, it's critical to write plans down and communicate them widely.

3. Goals and Objectives Should Be SMARTER

SMARTER is an acronym, that is, a word composed by joining letters from different words in a phrase or set of words. In this case, a SMARTER goal or objective is:

Specific:
For example, it's difficult to know what someone should be doing if they are to pursue the goal to "work harder". It's easier to recognize "Write a paper".

Measurable:
It's difficult to know what the scope of "Writing a paper" really is. It's easier to appreciate that effort if the goal is "Write a 30-page paper".

Acceptable:
If I'm to take responsibility for pursuit of a goal, the goal should be acceptable to me. For example, I'm not likely to follow the directions of someone telling me to write a 30-page paper when I also have to five other papers to write. However, if you involve me in setting the goal so I can change my other commitments or modify the goal, I'm much more likely to accept pursuit of the goal as well.

Realistic:
Even if I do accept responsibility to pursue a goal that is specific and measurable, the

goal won't be useful to me or others if, for example, the goal is to "Write a 30-page paper in the next 10 seconds".

Time frame:
It may mean more to others if I commit to a realistic goal to "Write a 30-page paper in one week". However, it'll mean more to others (particularly if they are planning to help me or guide me to reach the goal) if I specify that I will write one page a day for 30 days, rather than including the possibility that I will write all 30 pages in last day of the 30-day period.

Extending:
The goal should stretch the performer's capabilities. For example, I might be more interested in writing a 30-page paper if the topic of the paper or the way that I write it will extend my capabilities.

Rewarding:
I'm more inclined to write the paper if the paper will contribute to an effort in such a way that I might be rewarded for my effort.

4. Build in Accountability (Regularly Review Who's Doing What and By When?)

Plans should specify who is responsible for achieving each result, including goals and objectives. Dates should be set for completion of each result, as well. Responsible parties should regularly review status of the plan. Be sure to have someone of authority "sign off" on the plan, including putting their signature on the plan to indicate they agree with and support its contents. Include responsibilities in policies, procedures, job descriptions, performance review processes, etc.

5. Note Deviations from the Plan and Replan Accordingly

It's OK to deviate from the plan. The plan is not a set of rules. It's an overall guideline. As important as following the plan is noticing deviations and adjusting the plan accordingly.

6. Evaluate Planning Process and the Plan

During the planning process, regularly collect feedback from participants. Do they agree with the planning process? If not, what don't they like and how could it be done better? In large, ongoing planning processes (such as strategic planning, business planning, project planning, etc.), it's critical to collect this kind of feedback regularly.

During regular reviews of implementation of the plan, assess if goals are being achieved or not. If not, were goals realistic? Do responsible parties have the resources necessary to achieve the goals and objectives? Should goals be changed? Should more priority be placed on achieving the goals? What needs to be done?
Finally, take 10 minutes to write down how the planning process could have been done better. File it away and read it the next time you conduct the planning process.

7. Recurring Planning Process is at Least as Important as Plan Document

Far too often, primary emphasis is placed on the plan document. During planning, panners learn a great deal from ongoing analysis, reflection, discussion, debates and dialogue around issues and goals in the system. Far too often, people put emphasis on written codes of ethics and codes of conduct. While these documents certainly are important, at least as important is conducting ongoing communications around these documents. The ongoing communications are what sensitize people to understanding and following the values and behaviors suggested in the codes.

8. Nature of the Process Should Be Compatible to Nature of Planners

A prominent example of this type of potential problem is when planners don't prefer the "top down" or "bottom up", "linear" type of planning (for example, going from general to specific along the process of an environmental scan, SWOT analysis, mission/vision/values, issues and goals, strategies, objectives, timelines, etc.) There are other ways to conduct planning.

E. MEETING MANAGEMENT

How do you feel when someone proposes a meeting? If you are like most people, you groan and expect to be bored, have your time wasted, cope with other people's turfism, and get nothing done. However, meetings are a standard and often essential way of sharing information, planning, solving problems, developing strategies, and making decisions. They will be the core of your planning work.

Managing effective meetings requires commitment and diligence, but including fun and opportunities for networking can also help them go more smoothly. Meetings are expensive - consider the hourly rates of the people involved. Time ill spent in a meeting is time taken away from other important tasks. If participants consider the planning meetings to be a waste of time, they will stop coming.

What Makes a Meeting Work?

There are two important ways to evaluate the success of a meeting. The first is to review the "what." What were the results of the meeting? Did the group accomplish the meeting's purpose? What did you get done? The second way is the "how." How was this meeting worthwhile? How were the decisions made? How did people get along and work to accomplish the meeting's purpose? How do people feel about the time spent working together? How were people encouraged to be involved and innovative? How long did it take to meet the meeting's objectives? How worthwhile was the time? What contributed to the success of the meeting?

How to Get Good Results from a Meeting

- Have a clearly understood and agreed-upon purpose. Don't meet unless you can state the purpose in a sentence.
- Be clear about who should attend the meeting and how they can benefit from as well as contribute to the meeting's goals.
- Define roles in writing. Who facilitates? Who records? Who prepares?
- Have an agenda that is available to everyone before the meeting. Mail or e-mail it with the minutes of the previous meeting.
- Review the agenda at the beginning of the meeting, and make any changes.
- Stick to the agreed-upon time frame. Adjourn early if you finish early. If your habitually run out of time, seek agreement to meet longer in future or form subcommittees empowered to deal with specific issues.
- Consider various ways for sharing information during the meeting: flipcharts, whiteboards, overheads, computer presentations.
- Develop a decision-making process. Voting? Consensus? Majority rules? When to "sleep on it"? Put these decisions in your bylaws.

• Refocus tangential conversation. Relate the group process to the purpose.
• Define clearly decisions that are made. Establish the need for follow-up. Promote and expect accountability.

1. Selecting Participants

• The decision about who is to attend depends on what you want to accomplish in the meeting. This may seem too obvious to state, but it's surprising how many meetings occur without the right people there.
• Don't depend on your own judgment about who should come. Ask several other people for their opinion as well.
• If possible, call each person to tell them about the meeting, it's overall purpose and why their attendance is important.
• Follow-up your call with a meeting notice, including the purpose of the meeting, where it will be held and when, the list of participants and whom to contact if they have questions.
• Send out a copy of the proposed agenda along with the meeting notice.
• Have someone designated to record important actions, assignments and due dates during the meeting. This person should ensure that this information is distributed to all participants shortly after the meeting.

2. Developing Agendas

• Develop the agenda together with key participants in the meeting. Think of what overall outcome you want from the meeting and what activities need to occur to reach that outcome. The agenda should be organized so that these activities are conducted during the meeting.
• In the agenda, state the overall outcome that you want from the meeting
• Design the agenda so that participants get involved early by having something for them to do right away and so they come on time.
• Next to each major topic, include the type of action needed, the type of output expected (decision, vote, action assigned to someone), and time estimates for addressing each topic
• Ask participants if they'll commit to the agenda.
• Keep the agenda posted at all times.
• Don't overly design meetings; be willing to adapt the meeting agenda if members are making progress in the planning process.
• Think about how you label an event, so people come in with that mindset; it may pay to have a short dialogue around the label to develop a common mindset among attendees, particularly if they include representatives from various cultures.

3. Opening Meetings

• Always start on time; this respects those who showed up on time and reminds late-comers that the scheduling is serious.
• Welcome attendees and thank them for their time.
• Review the agenda at the beginning of each meeting, giving participants a chance to understand all proposed major topics, change them and accept them.
• Note that a meeting recorder if used will take minutes and provide them back to each participant shortly after the meeting.
• Model the kind of energy and participant needed by meeting participants.
• Clarify your role(s) in the meeting.

4. Establishing Ground Rules for Meetings

• You don't need to develop new ground rules each time you have a meeting, surely. However, it pays to have a few basic ground rules that can be used for most of your meetings. These ground rules cultivate the basic ingredients needed for a successful meeting.
• Four powerful ground rules are: participate, get focus, maintain momentum and reach closure. (You may want a ground rule about confidentiality.)
• List your primary ground rules on the agenda.
• If you have new attendees who are not used to your meetings, you might review each ground rule.
• Keep the ground rules posted at all times.

5. Time Management

• One of the most difficult facilitation tasks is time management -- time seems to run out before tasks are completed. Therefore, the biggest challenge is keeping momentum to keep the process moving.
• You might ask attendees to help you keep track of the time.
• If the planned time on the agenda is getting out of hand, present it to the group and ask for their input as to a resolution.

6. Evaluations of Meeting Process

• It's amazing how often people will complain about a meeting being a complete waste of time -- but they only say so after the meeting. Get their feedback during the meeting when you can improve the meeting process right away. Evaluating a meeting only at the end of the meeting is usually too late to do anything about participants' feedback.

• Every couple of hours, conduct 5-10 minutes "satisfaction checks".

• In a round-table approach, quickly have each participant indicate how they think the meeting is going.

7. Evaluating the Overall Meeting

• Leave 5-10 minutes at the end of the meeting to evaluate the meeting; don't skip this portion of the meeting.

• Have each member rank the meeting from 1-5, with 5 as the highest, and have each member explain their ranking

• Have the chief executive rank the meeting last.

8. Closing Meetings

• Always end meetings on time and attempt to end on a positive note.

• At the end of a meeting, review actions and assignments, and set the time for the next meeting and ask each person if they can make it or not (to get their commitment)

• Clarify that meeting minutes and/or actions will be reported back to members in at most a week (this helps to keep momentum going).

F. BASICS OF DELEGATING

1. The Art of Delegation

Delegation is a skill of which we have all heard - but which few understand. It can be used either as an excuse for dumping failure onto the shoulders of subordinates, or as a dynamic tool for motivating and training your team to realize their full potential.
"I delegate myne auctorite" (Palsgrave 1530)

Delegation underpins a style of management which allows your staff to use and develop their skills and knowledge to the full potential. Without delegation, you lose their full value.

As the ancient quotation above suggests, delegation is primarily about entrusting your authority to others. This means that they can act and initiate independently; and that they assume responsibility with you for certain tasks. If something goes wrong, you remain responsible since you are the manager; the trick is to delegate in such a way that things get done but do not go (badly) wrong.

2. Objective

The objective of delegation is to get the job done by someone else. Not just the simple tasks of reading instructions and turning a lever, but also the decision making and changes which depend upon new information. With delegation, your staff have the authority to react to situations without referring back to you.

If you tell the janitor to empty the bins on Tuesdays and Fridays, the bins will be emptied on Tuesdays and Fridays. If the bins overflow on Wednesday, they will be emptied on Friday. If instead you said to empty the bins as often as necessary, the janitor would decide how often and adapt to special circumstances. You might suggest a regular schedule (teach the janitor a little personal time management), but by leaving the decision up to the janitor you will apply his/her local knowledge to the problem. Consider this frankly: do you want to be an expert on bin emptying, can you construct an instruction to cover all possible contingencies? If not, delegate to someone who gets paid for it.

To enable someone else to do the job for you, you must ensure that:

- they know what you want
- they have the authority to achieve it
- they know how to do it.

These all depend upon communicating clearly the nature of the task, the extent of their discretion, and the sources of relevant information and knowledge.

3. Information

Such a system can only operate successfully if the decision-makers (your staff) have full and rapid access to the relevant information. This means that you must establish a system to enable the flow of information. This must at least include regular exchanges between your staff so that each is aware of what the others are doing. It should also include briefings by you on the information which you have received in your role as manager; since if you need to know this information to do your job, your staff will need to know also if they are to do your (delegated) job for you.

One of the main claims being made for computerized information distribution is that it facilitates the rapid dissemination of information. Some protagonists even suggest that such systems will instigate changes in managerial power sharing rather than merely support them: that the "enknowledged" workforce will rise up, assume control and innovate spontaneously. You may not believe this vision, but you should understand the premise. If a manager restricts access to information, then only he/she is able to make decisions which rely upon that information; once that access is opened to many others, they too can make decisions - and challenge those of the manager according to additional criteria. The manager who fears this challenge will never delegate effectively; the manager who recognizes that the staff may have additional experience and knowledge (and so may enhance the decision-making process) will welcome their input; delegation ensures that the staff will practice decision-making and will feel that their views are welcome.

4. Effective control

One of the main phobias about delegation is that by giving others authority, a manager loses control. This need not be the case. If you train your staff to apply the

same criteria as you would yourself (by example and full explanations) then they will be exercising your control on you behalf. And since they will witness many more situations over which control may be exercised (you can't be in several places at once) then that control is exercised more diversely and more rapidly than you could exercise it by yourself. In engineering terms: if maintaining control is truly your concern, then you should distribute the control mechanisms to enable parallel and autonomous processing.

5. What to delegate

There is always the question of what to delegate and what to do yourself, and you must take a long term view on this: you want to delegate as much as possible to develop you staff to be as good as you are now.

The starting point is to consider the activities you used to do before you were promoted. You used to do them when you were more junior, so someone junior can do them now. Tasks in which you have experience are the easiest for you to explain to others and so to train them to take over. You thus use your experience to ensure that the task is done well, rather than to actually perform the task yourself. In this way you gain time for your other duties and someone else becomes as good as your once were (increasing the strength of the group).

Tasks in which your staff have more experience must be delegated to them. This does not mean that you relinquish responsibility because they are expert, but it does mean that the default decision should be theirs. To be a good manager though, you should ensure that they spend some time in explaining these decisions to you so that you learn their criteria.

Decisions are a normal managerial function: these too should be delegated - especially if they are important to the staff. In practice, you will need to establish the boundaries of these decisions so that you can live with the outcome, but this will only take you a little time while the delegation of the remainder of the task will save you much more.

In terms of motivation for your staff, you should distribute the more mundane tasks as evenly as possible; and sprinkle the more exciting onces as widely. In general, but especially with the boring tasks, you should be careful to delegate not only the performance of the task but also its ownership. Task delegation, rather than task assignment, enables innovation. The point you need to get across is that the task may be changed, developed, upgraded, if necessary or desirable. So someone who collates the monthly figures should not feel obliged to blindly type them in every first-Monday; but should feel empowered to introduce a more effective reporting format, to use Computer Software to enhance the data processing, to suggest and implement changes to the task itself.

6. Negotiation

Since delegation is about handing over authority, you cannot dictate what is delegated nor how that delegation is to be managed. To control the delegation, you need to establish at the beginning the task itself, the reporting schedule, the sources of information, your availability, and the criteria of success. These you must negotiate with your staff: only by obtaining both their input and their agreement can you hope to arrive at a workable procedure.

7. Effective Delegation

The hallmark of good supervision is effective delegation. Delegation is when supervisors give responsibility and authority to subordinates to complete a task. Effective delegation develops people who are ultimately more fulfilled and productive. Managers become more fulfilled and productive themselves as they learn to count on their staffs and are freed up to attend to more strategic issues.

Delegation is often very difficult for new supervisors, particularly if they have had to scramble to start the nonprofit or start a major new service themselves. Many managers want to remain comfortable, making the same decisions they have always made. They believe they can do a better job themselves. They don't want to risk losing any of their power and stature (ironically, they do lose these if they don't learn to delegate effectively). Often, they don't want to risk giving authority to subordinates in case they fail and impair the organization.

a. Delegate the whole task to one person.
   This gives the person the responsibility and increases their motivation.

b. Select the right person.
   Assess the skills and capabilities of subordinates and assign the task to the most appropriate one.

c. Clearly specify your preferred results.
   Give information on what, why, when, who, where and how. Write this information down.

d. Delegate responsibility and authority
   Assign the task, not the method to accomplish it. Let the subordinate complete the task in the manner they choose, as long as the results are what the supervisor specifies. Let the employee have strong input as to the completion date of the project. Note that you may not even know how to complete the task yourself -- this is often the case with higher levels of management.

e. Ask the employee to summarize back to you.
   Ask to hear their impressions of the project and the results that you prefer.

f. Get ongoing non-intrusive feedback about progress on the project.

This is a good reason to continue to get weekly, written status reports from all direct reports. Reports should cover what they did last week, plan to do next week and any potential issues. Regular staff meetings provide this ongoing feedback, as well.

g. Maintain open lines of communication.
Don't hover over the subordinate, but sense what they're doing and support their checking in with you along the way.

h. If you're not satisfied with the progress, don't immediately take the project back. Continue to work with the employee and ensure they perceive the project as their responsibility.

i. Evaluate and reward performance.
Evaluate results, not methods. Address insufficient performance and reward successes (including the manager's).

8. Tips on Delegating

• Delegation helps people grow underneath you in an organization and thus pushes you even higher in management. It provides you with more time, and you will be able to take on higher priority projects.
• Delegate whole pieces or entire job pieces rather than simply tasks and activities.
• Clearly define what outcome is needed, then let individuals use some creative thinking of their own as to how to get to that outcome.
• Clearly define limits of authority that go with the delegated job. Can the person hire other people to work with them? Are there spending constraints?
• Clear standards of performance will help the person know when he or she is doing exactly what is expected.
• When on the receiving end of delegation, work to make your boss' job easier and to get the boss promoted. This will enhance your promotability also.
• Assess routine activities in which you are involved. Can any of them be eliminated or delegated?
• Never underestimate a person's potential. Delegate slightly more than you think the person is capable of handling. Expect them to succeed, and you will be pleasantly surprised more frequently than not.
• Expect completed staff work from the individuals reporting to you. That is, they will come to you giving you alternatives and suggestions when a problem exists rather than just saying "Boss, what should we do?"
• Do not avoid delegating something because you cannot give someone the

entire project. Let the person start with a bite size piece, then after learning and doing that, they can accept larger pieces and larger areas of responsibility.

• Agree on a monitoring or measurement procedure that will keep you informed as to progress on this project because you are ultimately still responsible for it and need to know that it is progressing as it should. In other words-If you can't measure it don't delegate it.

• Keep your mind open to new ideas and ways of doing things. There just might be a better way than the way something has previously been done.

• Delegation is not giving an assignment. You are asking the person to accept responsibility for a project. They have the right to say no.

• Encourage your people to ask for parts of your job.

• Never take back a delegated item because you can do it better or faster. Help the other person learn to do it better.

• Agree on the frequency of feedback meetings or reports between yourself and the person to whom you are delegating. Good communication will assure ongoing success.

• Delegation strengthens your position. It shows you are doing your job as a manager - getting results with others. This makes you more promotable.

• Delegation is taking a risk that the other person might make a mistake, but people learn from mistakes and will be able to do it right the next time. Think back to a time a project was delegated to you and you messed it up. You also learned a valuable lesson.

• Find out what the talents and interests of your people are and you will be able to delegate more intelligently and effectively.

• A person will be more excited about doing a project when they came up with the idea of how to do it, than if the boss tells them how to do it.

• Be sensitive to upward delegation by your staff. When they ask you for a decision on their project, ask them to think about some alternatives which you will then discuss with them. This way responsibility for action stays with the staff member.

• Don't do an activity that someone else would be willing to do for you if you would just ask them.

• "Push" responsibility down in a caring helpful way.

• Remember, you are not the only one that can accomplish an end result. Trust others to be capable of achieving it.

• Break large jobs into manageable pieces and delegate pieces to those who can do them more readily.

• Keep following up and following through until the entire project is done.

• Resist the urge to solve someone else's problem. They need to learn for themselves. Give them suggestions and perhaps limits but let them take their own action.

G. COACHING AND MENTORING?

Coaching and Mentoring are not the same. What contributes to the confusion of what is coaching and what is mentoring is that a coach and mentor often perform their work using similar skills sets, such as strong interpersonal and communication skills. Effective mentors (as well as effective supervisors, managers, and executives - leaders of all kinds) also use effective coaching skills. Mentors usually reside within the same organization as the person being mentored. Coaches, on the other hand, are more often than not are external to the organization, however, there are some internal coaches.

Mentoring is a process that focuses specifically on providing guidance, direction, and career advice. In contrast, coaching is a specific skill that can be used in a variety of situations and settings. A mentor uses coaching skills during the mentoring process. Mentors will share their knowledge in a way that helps people take greater control of their lives', whereas coaches take a 3 step approach:

1. Build on strengths,
2. Tackle weaknesses (areas for improvement), and
3. Facilitate ongoing success.

Mentor	Coach
Individual	Performance
Facilitator with no agenda	Specific agenda
Self selecting	Comes with the job
Perceived value	Position
Affirmation/learning	Teamwork/performance
Life	Task related

1. Coaching

Coaching is a learning technique that involves observing an individual at work and providing feedback to enhance performance or correct deficiencies. Coaching has become the cornerstone of management development in many top organizations. Coaching's primary emphasis is on maximizing people's potential by working on their perceptions, self-confidence and creative drive. It also focuses on improving skills, knowledge and techniques.

When should an employee have coaching?

- When they are assuming new job duties
- To develop or provide new skills through on-the-job training
- To introduce new procedures or technologies
- To enhance performance and correct deficiencies

• To prepare individuals for career development
• To develop members of a work team

Coaching employees serves five major purposes:

• It effectively modifies employee behavior patterns and/or job skills for the benefit of both the employee and the management/supervision staff of the company.
• It is used to review employee's performance and behavior patterns, letting the employee know where they have made progress and shown improvement.
• It helps management, at all levels, to assist their subordinates in recognizing their own strengths and weaknesses.
• It is used to show employees what they must do to improve themselves and to help them in setting realistic goals for specific achievements.
• It is used to help employees recognize a problem which may exist and correct it.

Two-Way Benefits of Coaching

Coaching is a long-term strategy, but the benefits of managerial coaching are two-way:

• For employees: Improved performance, greater enthusiasm, and greater job satisfaction.
• For managers: Improved communication, motivation, delegation, employee empowerment, planning, and monitoring skills.

2. Mentoring

Mentoring is a relationship, which gives people the opportunity to share their professional and personal skills and experiences, and to grow and develop in the process. It is a crucial step to career advancement and is offered to an employee by someone other than his or her manager in order to support performance and accelerate their business success within an organization. Mentoring is an effective strategy, which can contribute significantly to the career development of employees.

The mentor is usually a more experienced employee who may have a similar technical background (although that is not always a requirement). The mentor's primary responsibility is to the organization and their main means of intervention is sharing their own experience, either at a task or political level.

Typically, it is a one-on-one relationship between a more experienced and a less experienced employee. It is based upon encouragement, constructive comments, openness, mutual trust, respect and a willingness to learn and share. It is a deliberate pairing of a more skilled or experienced person with a lesser skilled or experienced one, with the agreed-upon goal of having the less experienced person grow and develop specific competencies.

When management is considering the establishment of a mentoring program, a few basic but critical steps are necessary to ensure that the organization's objectives are met. Once a team of program advisors are appointed (typically HR, or management team members) they should establish the initiative's parameters. Some considerations in setting up a program are:

- Conduct audits of existing experience, skills and capabilities that are available, and of existing processes (360-degree feedback model, cross-functional team play).
- Link organizational goals to the mentoring program -- for example curtailing attrition, creating a foundation for succession planning, honing skills-transfer processes.
- Identify and elicit feedback from the most appropriate pool of mentors and students on their willingness to participate and how they envision the program supporting organizational goals.
- Devise rules that govern the program, including required tenure for participation, current level of mentors, current status of students, etc.
- Develop a strategic plan for positioning the program inside company and as a recruitment tool outside the company.

To benefit from the mentoring experience, students should be selected from a consistent responsibility level within the organization, for example:

- Middle managers
- High-potential managers who are capable, ready and willing to advance several levels
- Succession candidates
- Employees seeking a career transition
- Experienced new employees looking to broaden their skills

For the student-mentor relationship to be fruitful, the mentor must have the experiences, at minimum, to provide a broader perspective of the business. If the mentor does not have the proper qualifications, the relationship will lack mutual respect, commitment and trust - the key ingredients to effective tutoring and, ultimately, performance- and leadership-building processes.

After the mentor and student candidates have been selected, a formal interview process will uncover characteristics and other information that will allow program administrators to make effective mentor/student matches.

A mentor program provides:

Benefits to the Mentee:

- Increased skills and knowledge
- Increased potential for career mobility and promotion
- Improved understanding of their roles in the organization
- Insights into the culture and unwritten rules of the organization
- A supportive environment in which successes and failures can be evaluated
- A smoother transition through management levels
- A powerful learning tool to acquire competencies and professional experience
- Potential for increased visibility
- Networking opportunities
- Development of professional self-confidence
- Recognition, satisfaction, and empowerment

Benefits to the Mentor

- Opportunities to test new ideas
- Enhanced knowledge of other areas of the agency
- Renewed enthusiasm for their role as an experienced employee
- Challenging discussions with people who have fresh perspectives and who are not already part of the organizational thinking
- Satisfaction from contributing to the mentee's development
- Opportunities to reflect upon and articulate their role
- Improved ability to share experience and knowledge

Benefits to the Agency

- Improved delivery of services through more informed and skilled staff
- Application of knowledge gained from mentoring
- Reduced recruitment and selection costs as a result of higher employee retention
- Progress towards diversity and equal opportunity in the workplace
- Improved communication between separate areas of the agency
- Support networks for employees in times of organizational change
- Managers with enhanced people management skills
- Successful mentees often become mentors and better people managers

3. What are the roles of a coach and the roles of a mentor?

A Coach

- Helps shift the world view of the client (the person being coached) in a way that opens up new possibilities for action
- Often draws on assessment data from the client and others to increase the client's awareness of areas for development and set goals and a plan for reaching them
- Assists the client in staying focused on an area of improvement or learning objective to achieve the desired outcome(s) or change
- Explores possibilities and potential resulting outcomes
- Helps the client identify values and passions and align them with professional goals
- Works with a client to discover the answers from within
- Listens, make inquiries, and observes/reflects
- Generally asks powerful, thought-provoking questions that tap the inherent wisdom and creativity of the client

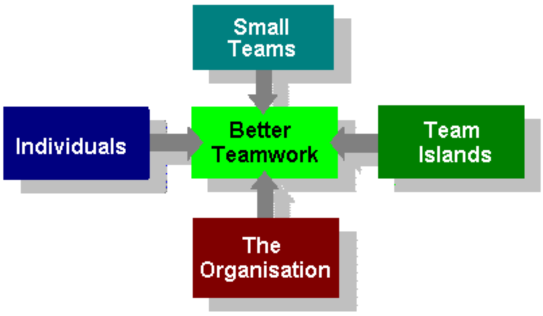
A Mentor

- Usually occupies a senior-level assignment of authority and influence within the organization
- Knows the organization/its structure, policies, and processes (both spoken and unspoken)
- Has a broad view and multiple working experiences
- Knows the "politics" of the organization
- Shares knowledge and experiences
- Helps identify developmental opportunities within the organization and "open doors"
- Knows when to interpret and when to pass on wisdom
- Generally tells, advises, instructs, suggests, gives opinions
- And, an effective mentor also knows when and how to coach

H. TEAMBUILDING AND TEAMWORK

1. Four Types of Team Building

Once you have established the basic foundation of shared commitment, the approach you then take to team building depends on the size of the team and the types of issues that may be inhibiting good teamwork.



1. Individuals

In a project environment, where team composition is continually changing, the emphasis must be on selecting people who are self-starters and developing the skills in individuals to become effective team members very quickly. The 'scale' involved is 1 person, and the team building consultant or trainer is endeavouring to change the skills and abilities of the individual at operating within a team (or within multiple teams).

2. Small Teams

In teams where membership is static - typically in management teams - the motivational challenge is to align the drive of the disparate individuals around the same goals. There can be many inhibitors to performance - eg: personality, dynamics, processes etc., and how the individuals within the team relate to each other can have a big bearing on team performance. So, if a member leaves, or another joins, the dynamics of the team can be changed greatly and the task of team building has to start again. Here, the scale is small - say, 2 to about 12 - and the main priorities are to build the foundation of collective ownership of team objectives, and then overcome inhibitors through team bonding, facilitation, processes, etc..

3. Team Islands

A larger scale operates between teams. Where the teams do not relate well, they are called 'team islands'. The motivational challenge is to overcome the problem of "in/out groups" so that people have positive attitudes towards those in other teams. There are often many barriers between teams that inhibit team performance, but not all of them can be removed. The main task, therefore, is the bridging, or relationship, between the teams.

4. Large Teams

The largest scale is organisational culture change. With the exception of the senior management team, any changes to personnel have limited impact on the corporate culture. The key aim of company-wide team building is to change the behaviours and attitudes prevalent in the organisation, which are almost independent of who actually works there - new recruits who are 'different' often start behaving in accord with the existing culture.

Summary:

- A team is a group of people working towards a common goal
- Team building is a process of motivating and enabling the team to achieve that goal
- The stages involved include clarifying the team goals, building ownership, removing inhibitors, introducing enablers and using processes to move up the ladder of performance
- The nature of the team building varies in terms of scale, and what you are trying to achieve:

Type of team building	Scale	What is changed
Individual	1 person	Who is involved in the project, and their individual skills/perceptions
Small Team	2-12 people	Orientation around the team goal, and bonding (relationships between people)
Team Islands	2 or more teams	Orientation towards higher goals, and bridging (relationships between teams)
Organisation	15+ people	Commitment to the corporate mission, and the culture of the organisation

2. How To Build A Team

Start with Your Ability to Relate

Every possibility, from landing the contract to the romantic evening hinges on your ability to relate. But neither profit nor pleasure are the primary motivation for teamwork. Productive teamwork moves you toward challenge, through change, with more confidence. Working well on any team generates energy and enthusiasm for life.

Some are More Skilled than Others

This ability is learned. You do not need complex interaction formulas. You don't have to be easy-going, well-educated, hard-nosed, or even especially intelligent to build a team. You don't have to be anything other than yourself. You can be effective with people using common sense and a few fundamental principles.

1. Vision
2. Commitment
3. Trust
4. Inclusion
5. Help Exchange

1. Vision

Vision means being able to excite the team with large, desired outcomes.

Large outcomes mean devising goals that attract missionaries. The first step in vision is to project such a goal. This goal must be bigger than a pay check. It must contain challenge, appeal to personal pride, and provide an opportunity to make a difference and know it. Then the goal can become a powerful vision.
Next, team leaders position the goal by picturing success. Initial questions might be, "What will it look like when we get there?", "What will success be like, feel like?," "How will others know?" When a large, missionary-friendly goal has been pictured and clearly communicated, the vision is complete.

2. Commitment

Commitment can be a dangerous concept because of its attendant assumptions. Some may assume, for example, that commitment means long hours, while to others it may mean productivity. When expectations are defined, success rates soar. When leaders assume that everyone "should" be committed, as a matter of course, we overlook the difficulties many have with certain commitments.

If people cannot initially commit, it doesn't mean they don't care. More often, it means they do care, and they are caught up in a process of doubt. This process precedes every meaningful commitment. Effective leaders catalyze this process, so that the critical mass of people can pass through this stage efficiently on their way to genuine commitment and innovative strategies.

This pre-commitment process is the same for team leaders and members. When we ponder a new commitment, we climb up to a kind of mental diving board. Commitments contain unknowns, and some warn of possible failure. It is common for people to neither jump nor climb back down the "ladder," but rather to stay stuck at the end of the board, immobilized in pros, cons, obstacles, and worries. In this state of mind, the obstacles begin to rule, obscuring the vision, blunting motivation.

When leaders do not understand the commitment process they tend to seek accountability without providing support. Without a means to process doubts and fears, people often feel pressured to commit, but can't. One option, often unconscious, is to pretend to commit, to say "yes" and mean "maybe" at best. The pretended commitment is a form of wholly unnecessary corporate madness.

The solution to this set of problems is two fold: establish an atmosphere of trust, and within that atmosphere encourage inclusion.

3. Trust

Trust is the antidote to the fears and risks attendant to meaningful commitment. Trust means confidence in team leadership and vision. When trust prevails, team members are more willing to go through a difficult process, supported through ups, downs, risk and potential loss.

Trust is most efficiently established when leadership commits to vision first, and everyone knows those commitments are genuine. The process for leaders to commit is the same as for everyone else: assess pre-commitment doubts, questions, unknowns and fears. This involves three simple steps:

• List the unknowns.
• Assess worst case scenarios and their survivability.
• Research the unknowns.

The list of unknowns reveals some answers and further questions. Some of these questions lend themselves to research (others' experience, a small pilot plan), and some have no apparent answers from our pre-commitment position. These latter comprise the bottom line or irreducible risk. We learn the outcome only after commitment. Every major commitment contains some irreducible risk, some lingering unknowns. We therefore make every major commitment in at least partial ignorance.

Leadership now understands the potential loss and gain involved in the new vision. At this point, leadership can commit itself, and prepare to include other team members. That preparation must include a plan for leadership to share visibly both risk and reward with the other team members who will be coming on board.

With leadership's commitment to a clear vision, and a genuine plan to share risks and rewards, the atmosphere for trust is in place. We are now ready to include others in our team effort.

4. Inclusion

Inclusion means getting others to commit to the team effort, helping others through their "diving board doubts" to genuine commitment. Since leaders now understand this process first hand, we need only communicate with the potential team members to complete inclusion.

The best setting to obtain buy-in and build trust is in small groups that facilitate thorough give and take. The basic tasks are to communicate the vision, make sure it is understood, communicate leadership's commitment (including sharing risk and reward, and how), and elicit and address peoples' doubts.

Leaders will need three communication skills to achieve inclusion. These are the non-assumptive question, good listening, and directed response.

1. Non-assumptive questions ("What do you think?", "Can you tell me what is happening with this report?") invite real answers because they are inclusive, not intrusive. Questions containing assumptions ("Why are you skeptical?", "Why is this report so incomplete?") invite defensiveness. When converting an atmosphere of change and possibly skepticism to trust, added defensiveness is counter-productive.

2. Listening means separating the process of taking in information from the process of judging it. Kept separate, both processes are valuable. Mixed, especially when the receiver is a designated leader, the sender is invited to stop communicating or to change the message midstream.

3. Directed response. Effective team leaders demonstrate responsiveness. Since leaders

have already processed their own pre-commitment doubts, many questions can be answered on the spot. Some require research and a time line for response. And some, which relate to the bottom line, irreducible risk, require a truthful "I don't know. I'm in the same soup as you."

5. Help Exchange

The final step in creating the team is to establish a corroborative, balanced strategy for reaching the committed vision. This plan will consist of all of the tasks and help exchange necessary to realize the overall vision. Your teammates themselves are in the best position to supply this information. Since by this time you have laid the groundwork for trust, and established good buy-in, your teammates are likely to be enthusiastically cooperative.

At this point, the leadership role is to catalyze consensus, not to issue orders. Consensus means that team members agree to, whether they necessarily agree with, a particular approach. Consensus occurs easily when most feel their ideas were heard and considered, whether or not the team ultimately chooses those ideas. Obtaining consensus again requires use of leadership communication skills: non-assumptive questions, good listening, and directed response.

3. Building the Winning Team

"Everyone wants to feel that they are on a winning team, that the company is moving ahead, and that they are an integral part of the group."

Beyond Hiring Great People

Building the winning team requires more than just hiring a bunch of talented people.

- It means hiring people who will work well together.
- It means developing a shared vision and commitment.
- It means physically bringing people together in formal group meetings for open discussion of broad-based issues.
- It means encouraging positive, informal interactions between group members.
- It means instilling a "winning" attitude throughout the organization.
- It means watching for and quickly trying to reverse team-building problems such as jealousy, cynicism, and defensive behavior.

Get 'Em To "Buy In"!

To build the winning team, you not only need to show people what direction the

company is headed in, but you need to get them to "buy into" this direction. Otherwise, you can't expect people to support a group if they don't agree with where it's headed or, worse, don't even know where it's headed.
Specifically, you need to show people:

- Your vision for the future.
- Your strategy for getting there.
- Why this is the best strategy.
- Every achievement that indicates this team is winning.

This is not a one-time discussion or announcement.

You need to constantly remind people what the organization stands for and that it does indeed hold a bright future for them!

Meetings Build Teams

Part of building the winning team is having some group meetings. Meetings, or even parties or celebrations, with as many people as possible from the entire organization, help build a feeling of solidarity throughout the organization.

But it is also important to have everyone participate in smaller group meetings where some work is done or some decisions are made. This makes people feel that they aren't just part of some big group, but that they are an active, important part of a team.

For key managers, or people in your work group, you should have an interactive meeting once per week-not a meeting where you just make announcements and summarize the work that's been done and needs to be done, but a meeting where everyone has an opportunity to give feedback on substantive issues.

Getting People To Work Together

Perhaps the most difficult part of building a winning team is encouraging positive, informal interaction between team members when you are not present. Here are some thoughts on this:

- Have team members take part in the hiring process of new team members.
- Assign specific projects for two team members to work on together.
- Try to arrange for close proximity of offices.
- Create an incentive-pay plan based on common goals such as profitability.
- Have a specific part of the salary review dependent upon "interaction with others."

• Take your team off-site for formal meetings as well as casual get-togethers to build a sense of bonding.

Watch Out For Team Destroyers!

Here are some of the problems that can rip the team-building process apart.

• Jealousy. Be on guard for jealousy whenever a new member is hired into the group. Go out of your way to tell other team members how much their work is appreciated.

• Cynicism. Some people are just negative by nature. Others might feel your company can't possibly prosper or they just don't like small companies, big companies, or whatever . . . . Be sure you are emphasizing the company's positive achievements to the group as a whole. And don't hesitate to confront any openly cynical individual and demand their behavior change at once.

• Lack of confidence. Some people lack confidence in themselves and view attacks on their opinions as attacks on themselves, responding with statements like "Are you telling me my fifteen years of experience don't matter?" Stop any discussion like this immediately and, in a private one-on-one meeting, patiently point out the defensive behavior.

4. Characteristics of a Team

• There must be an awareness of unity on the part of all its members.
• There must be interpersonal relationship. Members must have a chance to contribute, learn from and work with others.
• The member must have the ability to act together toward a common goal.

Ten characteristics of well-functioning teams:
• Purpose: Members proudly share a sense of why the team exists and are invested in accomplishing its mission and goals.
• Priorities: Members know what needs to be done next, by whom, and by when to achieve team goals.
• Roles: Members know their roles in getting tasks done and when to allow a more skillful member to do a certain task.
• Decisions: Authority and decision-making lines are clearly understood.
• Conflict: Conflict is dealt with openly and is considered important to decision-making and personal growth.
• Personal traits: members feel their unique personalities are appreciated and well utilized.
• Norms: Group norms for working together are set and seen as standards for every one

in the groups.

• Effectiveness: Members find team meetings efficient and productive and look forward to this time together.

• Success: Members know clearly when the team has met with success and share in this equally and proudly.

• Training: Opportunities for feedback and updating skills are provided and taken advantage of by team members.

Guidelines for effective team membership:

• Contribute ideas and solutions
• Recognize and respect differences in others
• Value the ideas and contributions of others
• Listen and share information
• Ask questions and get clarification
• Participate fully and keep your commitments
• Be flexible and respect the partnership created by a team -- strive for the "win-win"
• Have fun and care about the team and the outcomes.

Characteristics of a high-performance team:

• Participative leadership - creating an interdependence by empowering, freeing up and serving others.
• Shared responsibility - establishing an environment in which all team members feel responsibility as the manager for the performance team.
• Aligned on purpose - having a sense of common purpose about why the team exists and the function it serves.
• High communication - creating a climate of trust and open, honest communication.
• Future focused - seeing change as an opportunity for growth.
• Focused on task - keeping meetings and interactions focused on results.
• Creative talents - applying individual talents and creativity.

5. Developing a Team or Organization Vision

As Mark Twain once remarked about the weather, there's a lot of talk about vision, but very few managers really do anything about it. Visioning is sometimes an innate natural skill just like leadership sometimes is. And the moon sometimes blocks out the sun - but none occur very often. Most people have had to consciously and with great effort continually work to strengthen their visioning. Visionary leaders are seldom born that way (how many of those birth announcements have you seen lately?). Nor are they necessarily charismatic. They have had to work at making visioning habitual.

Here are a few pathways and pitfalls to organizational visioning:

• You and your team need to picture and describe your preferred future as vividly as possible. One approach is to imagine it's five years from today and you're being interviewed by Fortune magazine, a leading newspaper, or an industry journalist on the phenomenal success your company or team have had. Describe the results you've achieved and perhaps the approach you've used. Speak in the present tense as if it's all happening around you right now.

- Too many managers try to delegate "the vision thing" to a committee. It doesn't work. If you're a senior manager, caring for the culture and providing organization focus isn't just part of your job, it is your job.

- Unless you're an exceptionally clear and inspiring writer, be very careful about drafting a "vision statement" and using that as your communications centerpiece. Visions are about feelings, beliefs, emotions, and pictures. It's very hard to bring those across on paper (especially if the statement is developed by a committee). Vision ideas or summaries can, and should, be committed to paper, and widely circulated - but as a "leave behind," follow-up, or reminder. Visions are the most compelling when they are delivered in person by a leader who's an effective communicator. Powerful personal communication skills and energizing leadership are inseparable. Learn how to use "impassioned logic" by adding metaphors, stories, models, or examples to help everyone "see the big picture" and rouse their emotions to make it happen.

- Your team or organization needs a shared vision, not something that only a few people own. You need to make everyone a "spiritual stakeholder." That's usually a cascading process, but it can start in any part of an organization. Ideally, the senior management team defines the broad parameters of what business you're in and which direction you're heading. They can prepare a rough vision for input and refinement or leave things wide open for the rest of the organization to fill in.

- Invoke pride, stretch everyone's thinking, and stir the will-to-win emotions. Shoot to shake up the industry or change the rules of the game. Become the fastest, strongest, highest quality, most innovative, or best at something.

Vision is the critical focal point and beginning of high performance. But a vision alone won't make it happen. Unless the hard work of striving, building, and improving follows, even the most vibrant vision will remain only a dream.

6. The 5 P's Of Team Design And Development For Managers

When forming teams, manager should consider the team's purpose, member participation and placement, as well as team processes and plans. With the 5 P's of purpose, participation, placement, process, and plan, management can better design teams and determine development needs.

Purpose - Will the team clearly understand why it exists, what it is to do and how it will know they are successful? The team and management must agree to written purpose or mission statement so that they are working together in a common direction towards solutions that meet their overall purpose. Team goals and management deadlines should align with their overall purpose and will serve to guide the team performance and help them meet challenges.

Participation - Who would be the best people to include on the team and how large should the team be in order to accomplish its purpose? Management needs to consider necessary skill sets, professional attitudes, and process knowledge when selecting team members. In addition, for membership at the formation of team or as team personnel needs to grow, look for a balance between personality types for both task and people focus to be included so the solutions team may design will be more diverse and innovative to achieve team purpose and required work.

Placement - Where will the team members be physically located and how often should the team plan to have meetings? If the team is to be an intact work group, this may make some things simpler but the team will need a meeting room for complex problem solving. If the team is spread over multiple sites, managers will need to consider costs and possible problems team may have due to culture or time differences, and then determine whether travel for some meetings is required or if any special equipment is needed for members to meet regularly via phone or on-line.

Process - How will the team get to where it needs to go in order to accomplish its purpose? The team should develop and agree to their ground rules, any constraints that management may set related to decision-making authority or functional boundaries. Initial team training should include meeting management with a suggested meeting agenda and record-keeping formats, interpersonal communication, problem solving, and if relevant to team's work include process mapping.

Plan - Will the team acknowledge when its project or assignment will be complete and know what it needs to accomplish its tasks? If the team goals are specific to their purpose and the team agrees these are relevant and achievable goals, then the team needs to agree to a timeline for goals and a way to measure how they are doing towards goals. Not only should the team and their management define work deadlines and expected milestones in its goals and schedules, but it should also include necessary training to acquire team and task related skills.

7. Ten Ways Leadership Can Motivate Team Building And Performance

Presented for consideration are ten possible ways for managers, supervisors, and leaders to motivate their team with little budget and resources that may not require higher-level management approval. Most ideas can be implemented merely by a change in team accountability or the way the manager or leader communicates with the team and encourages the team to grow itself.

1. Be positive and set a good example for the team.
2. Share information on projects and business openly with the team.
3. When possible, let team work through their conflicts, but be ready to resolve negative conflict and bad situations before team morale is damaged.
4. Give feedback for improvement when necessary in a positive and thoughtful way.
5. Show appreciation for the work team does using different methods for rewarding team and members.
6. If a team request or member idea is not understood, ask for clarification or examples.
7. Actively listen to team complaints, ideas, and improvements.
8. Allow the team to evaluate its leader and suggest improvement ideas to help the team with respect, trust, and confidence in their leader.
9. Show confidence in the team by supporting their work and needs.
10. Do periodic team assessments with the members on how the team is doing as a way to increase awareness of what is right and identify opportunities for improvement.

Selecting from these ten ways to motivate teams, the team leader, supervisor, or manager can implement a strategy for building the team and improving individual performance as well. All it may take is changing the way the manager, supervisor, or leader communicates with and encourages the team's potential growth, as well as the team members accepting responsibility for their progress. The result should be improved team member attitudes, better team behaviors, and increasing work productivity.

8. Five Characteristics Of A Great Team

A great team will have:

1. Members sharing leadership responsibility and rotating other roles as needed.
2. All participating in idea generation, problem solving, and decision-making.
3. Members showing support, respect, and trust for one another.
4. All taking actions and doing work that is necessary to reach team goals.
5. Members managing conflict by confronting issues and inappropriate behaviors.

9. Team Climate Survey

Keep the following in mind:

- Teamwork improves the working environment.
- Teamwork keeps communication consistent.
- Teamwork relieves stress.
- Teamwork reduces errors.
- Teamwork keeps communication lines open.

Open Communications . . .

- Creates and maintains a climate of trust and open, honest communication.
- Allows team members to talk openly with one another.
- Promotes the exchange of feedback.
- Provide team members to work through misunderstandings and conflicts.

Commitment to a Common Purpose and Performance Goals . . .

- Keeps the purpose in the forefront of decision making and evaluations of team practices.
- Helps one another maintain the focus.

Shared Responsibility . . .

- Allows team members to feel equally responsible for the performance of the team and its outcome.
- Permits individuals to have primary roles for completing team tasks and remain flexible to do what is necessary to accomplish the team's goals and tasks.

Use of Resources and Talents . . .

- Utilizes the resources and talents of all the group members.
- Makes good use of the team's creative talent by openly sharing skills and knowledge, and encourages learning from one another.

Capacity for Self-Evaluation . . .

- Allows teams to stop and look at how well they are doing and what, if anything, may be hindering their performance and communication.

Participative Leadership

- Provides opportunities for team members to participate in decision making.
- Allows team members to help set goals and develop strategies for achieving these goals.
- Allows team members to help identify tasks and decide how to approach and evaluate them.

Characteristics of Effective Team Members

- Team members are supportive to achieve the results.
- Team members avoid "winning" or looking good at the expense of others.
- Team members keep the goal and the mission in mind.
- Team members are open to the ideas of others.
- Team members share information and ideas.
- Team members support the contribution of others.

Guidelines for Effective Team Membership

- Contribute ideas and solutions

  The willingness of all team members to draw on their own expertise and experience to contribute ideas and solutions is what makes an effective team. You should feel comfortable enough in the team setting to express yourself, and know that your ideas have value. Creative input from a variety of member perspectives is the basis of effective problem solving. Team "norms must encourage contributions, not inhibit them."

- Recognize and respect differences in others.

  Creative, effective teams bring together individuals with widely divergent skills and backgrounds who must work closely together to execute the tasks assigned to them. This can only be accomplished in an atmosphere of mutual respect and willingness to listen. You won't always agree with the ideas other team members bring to a discussion, but you should always be willing to listen without prejudice and contribute positively to the problem-solving process.

- Value the ideas and contributions of others

  A willingness to respect ideas and opinions that differ from your own is the cornerstone of positive and interactive teamwork. Input from every member of the groups should be carefully weighed and evaluated, never disparaged.

- Listen and share information

  Really listening to what other team members have to say is one of the most vital skills you can contribute to a productive team atmosphere. You should always be willing to give an attentive ear to the views of other team members and expect them to do the same for you.

- Ask questions and get clarification

  If an idea isn't clear to you, it is your responsibility to the team to ask questions until the matter is clarified. The field of education often has a language all their own; asking questions to cut through the jargon will benefit all participants.

- Participate fully and keep your commitments

  To fully participate, you have to contribute ideas, challenge conventional ways of doing things, ask questions, and complete the tasks assigned to you in a timely and professional manner. These are your responsibilities. Without the enthusiastic participation of all its members, a group is just a collection of individuals. The unique skills and viewpoints you bring to the team are crucial to the successful completion of tasks.

Team Climate Survey

Take the following team climate survey, to see where your board stands as a team.

Purpose	Do members of your board share a sense of why the team exists and are invested in accomplishing the mission? In a successful team: Members proudly share a sense of why the team exists and are invested in accomplishing its mission and goals
Priorities	Do members know what needs to be done next, by whom, and by when to achieve team goals? In a successful team: Members know what needs to be done next, by whom, and by when to achieve team goals.
Roles	Do members know their roles in getting tasks done and when to allow a more skillful member to do a contain task? Members know their roles in getting tasks done and when to allow more skillful members to do a certain task.
Decisions	Are authority and decision-making lines clearly understood? In a successful team: Authority and decision-making lines are clearly understood.
Conflict	Is conflict dealt with openly and considered important to decision-making and personal growth? In a successful team: Conflict is dealt with openly and is considered important to decision-making and personal growth.
Personal Traits	Do board members feel their unique personalities are appreciated and well utilized? In a successful team: Members feel their unique personalities are appreciated and well utilized.
Norms	Are group norms set for working together and are they seen as standards for everyone in the group? In a successful team: Group norms for working together are set and seen as standards for every one in the groups.
Effectiveness	Do members find team meetings efficient and productive and look forward to this time together? In a successful team: Members find team meetings efficient and productive and look forward to this time together.

Success	Do board members clearly know when the team has met with success and share in this equally and proudly? In a successful team: Members know clearly when the team has met with success and share in this equally and proudly.
Training	Are opportunities for feedback and updating skills provided and taken advantage of by team members? In a successful team: Opportunities for feedback and updating skills are provided and taken advantage of by team members.

http://www.managementhelp.org/grp_skll/teams/teams.htm#anchor416947