5. Team Management: Building, Leading, and Facilitating High-Performance Teams

Tuckman's Group Development Exercise

1. Identify your team's current stage:

- [ ] Forming
- [ ] Storming
- [ ] Norming
- [ ] Performing
- [ ] Adjourning

2. Write down 2-3 specific action steps you can take as a manager to support your team's growth and development based on their current stage.

Scenario Analysis Exercise: Applying Belbin's Team Roles

Let's put this knowledge to action with some scenarios.

Scenario 1: Implementation Challenges

Scenario Description: The team is innovative and full of creative ideas. However, they often struggle to turn these ideas into actionable plans and miss deadlines frequently. There is a lack of clear organization and follow-through on tasks.

Your Task:

- Identify which roles are underrepresented.
- Suggest which roles should be introduced or strengthened to improve team performance.

Scenario 2: Lack of Critical Evaluation

Scenario Description: The team is enthusiastic and highly motivated. They generate numerous ideas and move quickly on projects. However, they often overlook potential pitfalls and do not critically evaluate their plans, leading to avoidable mistakes.

Your Task:

- Identify which roles are underrepresented.
- Suggest which roles should be introduced or strengthened to improve team performance.

Scenario 3: Stagnation and Lack of Innovation

Scenario Description: The team is efficient and reliable, consistently meeting deadlines and producing quality work. However, they are stuck in their ways and lack innovation and fresh ideas. The team needs a creative spark to push boundaries and explore new opportunities.

Your Task:

- Identify which roles are underrepresented.
- Suggest which roles should be introduced or strengthened to improve team performance.

Team Charter Development Template

Introduction to the Team Charter

- **Purpose of the Charter**: Briefly describe the purpose of creating a Team Charter and its importance in setting the foundation for team success.

1. Mission and Vision Statement

- **Mission Statement (Objective)**: What are the immediate goals of the team?
  - **Instructions**: Write a concise statement that summarizes the primary objectives and how these contribute to the broader organizational goals.
- **Vision Statement (Aspiration)**: What is the long-term aspiration of the team?
  - **Instructions**: Craft a statement that provides a compelling picture of the future where the team's contributions have made a significant impact.

2. Team Composition and Leadership

- **Team Roles and Responsibilities**:
  - **Instructions**: List the roles by function and describe the key responsibilities and skills required for each.
- **Leadership and Sponsorship**:
  - **Instructions**: Outline the support structure provided by leadership, including resource allocation and decision-making authority.
- **Escalation Path**:
  - **Instructions**: Provide a clear escalation path for resolving issues that exceed the team's authority.

3. Operational Duties

- **Process Management**:
  - **Instructions**: Specify which team members are responsible for particular processes and the methodologies (e.g., Agile, Lean) to be used.

4. Scope of Work

- **Included and Excluded Tasks**:
  - **Instructions**: Define what tasks and projects the team will handle and what is explicitly out of scope.

5. Accountability Metrics

- **Performance Metrics**:
  - **Instructions**: Identify key performance indicators (KPIs) that link to both individual performance and team objectives. Schedule regular reviews.

6. Core Values and Conduct

- **Ethical Guidelines and Behavior Standards**:
  - **Instructions**: Write a code of ethics that includes expectations for communication, conflict resolution, and collaboration.

7. Communication Protocols

- **Communication Methods**:
  - **Instructions**: Detail the preferred tools and methods for different types of communication within the team, to leadership, and external parties.

8. Feedback and Continuous Improvement

- **Feedback Mechanisms**:
  - **Instructions**: Establish methods for collecting and implementing feedback from team members and stakeholders.

9. Completion and Implementation

- **Final Review and Approval**:
  - **Instructions**: Once all sections are completed, review the Charter with your team and management for feedback and make necessary adjustments.
- **Adoption**:
  - **Instructions**: Officially adopt the Charter and communicate its contents to all team members. Schedule periodic reviews to ensure it remains relevant and effective.

Tips for New Managers

- **Engage Your Team**: Involve team members in the drafting process to foster buy-in and gather diverse perspectives.
- **Keep It Flexible**: Remember that the Team Charter is a living document. Be prepared to make adjustments as your team evolves.
- **Focus on Practicality**: While thorough, ensure the Charter remains practical and concise to avoid overwhelming the team with bureaucracy.

Team Charter Development Example: Tech Innovators Inc.

Introduction to the Team Charter

Purpose of the Charter: The purpose of creating this Team Charter is to establish a clear framework that defines the team's goals, roles, responsibilities, and operational procedures. It is essential for aligning the team's efforts with organizational objectives, ensuring accountability, and fostering a collaborative and efficient work environment.

1. Mission and Vision Statement

Mission Statement (Objective): To develop cutting-edge software solutions that enhance user experience and drive digital transformation for our clients. Our immediate goal is to deliver high-quality, user-friendly applications within the project timelines, contributing to Tech Innovators Inc.'s reputation for innovation and excellence.

Vision Statement (Aspiration): To become the leading team in Tech Innovators Inc., renowned for our innovative solutions and our ability to set industry standards in software development. Our long-term aspiration is to impact the technology landscape significantly, making our products essential tools for businesses worldwide.

2. Team Composition and Leadership

Team Roles and Responsibilities:

- **Team Lead (Alice Johnson):** Oversees project planning, resource allocation, and ensures alignment with company goals. Requires strong leadership and project management skills.
- **Software Developers (John Smith, Lisa Wong):** Responsible for coding, debugging, and implementing software features. Requires proficiency in programming languages and problem-solving abilities.
- **QA Engineers (Mark Lee, Nina Patel):** Ensure software quality through rigorous testing and bug tracking. Requires attention to detail and knowledge of testing methodologies.
- **UX/UI Designer (Emma Davis):** Designs user interfaces and improves user experience. Requires creativity and expertise in design tools.
- **Product Manager (David Kim):** Manages product requirements and liaises between the team and stakeholders. Requires strong communication and organizational skills.

Leadership and Sponsorship:

- **Project Sponsor (Michael Brown, CTO):** Provides strategic direction, approves major decisions, and allocates necessary resources. Ensures the team has the support needed to achieve its goals.

Escalation Path:

1. Team Lead
2. Product Manager
3. Project Sponsor

3. Operational Duties

Process Management:

- **Agile Methodology:**
  - **Scrum Master (Alice Johnson):** Facilitates Agile ceremonies and removes impediments.
  - **Sprint Planning:** All team members participate in defining sprint goals.
  - **Daily Stand-ups:** Conducted every morning to discuss progress and obstacles.
  - **Sprint Retrospectives:** Held at the end of each sprint to identify improvement areas.

4. Scope of Work

Included and Excluded Tasks:

- **Included Tasks:**
  - Developing and maintaining software applications
  - Conducting user research and usability testing
  - Providing technical support for deployed applications
- **Excluded Tasks:**
  - Hardware maintenance and support
  - Non-software related tasks (e.g., marketing, sales)

5. Accountability Metrics

Performance Metrics:

- **KPIs:**
  - Number of features delivered per sprint
  - Bug resolution rate
  - Customer satisfaction score
  - Code quality metrics (e.g., code review results)

Regular Reviews:

- Performance reviews every quarter
- Sprint reviews at the end of each sprint

6. Core Values and Conduct

Ethical Guidelines and Behavior Standards:

- **Code of Ethics:**
  - Maintain integrity and honesty in all dealings
  - Respect and support team members
  - Communicate openly and constructively
  - Resolve conflicts professionally and collaboratively
  - Commit to continuous learning and improvement

7. Communication Protocols

Communication Methods:

- **Tools:**
  - Slack for daily communication
  - Jira for project management
  - Email for formal communications
  - Zoom for virtual meetings
- **Methods:**
  - Weekly team meetings
  - Bi-weekly one-on-ones with the team lead
  - Monthly updates to stakeholders

8. Feedback and Continuous Improvement

Feedback Mechanisms:

- **Methods:**
  - Anonymous feedback surveys
  - Regular team retrospectives
  - One-on-one feedback sessions
  - Stakeholder feedback meetings

Implementation of Feedback:

- Action plans based on survey results
- Continuous process improvement initiatives

9. Completion and Implementation:

Final Review and Approval:

- Review the Charter with the entire team and the project sponsor for feedback.

- Make necessary adjustments based on the feedback received.

Adoption:

- Officially adopt the Charter and ensure all team members understand its contents.
- Schedule periodic reviews every six months to ensure the Charter remains relevant and effective.

Tips for New Managers

- **Engage Your Team:** Involve team members in the drafting process to foster buy-in and gather diverse perspectives.
- **Keep It Flexible:** Remember that the Team Charter is a living document. Be prepared to make adjustments as your team evolves.
- **Focus on Practicality:** While thorough, ensure the Charter remains practical and concise to avoid overwhelming the team with bureaucracy.

Example: Planning The Meeting

Purpose

To align the development team on the upcoming product release, discuss project progress, identify any blockers, and plan for the next sprint.

Agenda

1. **Welcome and Purpose Overview** (5 minutes)
   - Brief introduction and purpose of the meeting.
2. **Project Progress Updates** (15 minutes)
   - Each team lead provides a brief update on their current tasks and progress.
3. **Review of Upcoming Release** (20 minutes)
   - Discuss features, deadlines, and expectations for the upcoming release.
4. **Blockers and Challenges** (15 minutes)
   - Identify and discuss any current blockers or challenges team members are facing.
5. **Sprint Planning** (30 minutes)
   - Plan tasks and assign responsibilities for the next sprint.
6. **Q&A and Open Discussion** (10 minutes)
   - Open the floor for any additional questions, concerns, or suggestions.

Length

- **Date:** June 25, 2024
- **Time:** 10:00 AM - 11:35 AM (1 hour 35 minutes)

Attendees

- **John Doe** (Project Manager)
- **Jane Smith** (Lead Developer)
- **Emily Johnson** (UI/UX Designer)
- **Michael Brown** (Backend Developer)
- **Sarah Davis** (QA Engineer)
- **David Wilson** (Product Owner)

Preparation

- **Review Documentation:** Familiarize with the software's features and current development status prior to the meeting.
- **Idea Generation:** Bring suggestions for the rollout strategy and consider potential obstacles.

Evaluation

- Meeting minutes documented and shared with all attendees.
- Clear action items and task assignments for the next sprint.
- Resolution of identified blockers or a plan to address them.
- Feedback collected from attendees on the meeting's effectiveness and any areas for improvement.

Team Decisions and Action Items Tracker

This sheet is a powerful tool for capturing the essence of a meeting's outcomes.

Meeting Date: [Insert Date]

Project/Topic: [Insert Project/Topic]

No.	Action Item (What needs to be done?)	Assigned To (Who is responsible?)	Deadline (When should it be completed?)	Status (Where does it stand?)	Notes (Any additional info?)
1					
2					
3					
4					
5					
6					
...					
25					

Instructions:

- Fill in the "No." column with the number corresponding to the action item.
- In the "Action Item" column, describe the task that was agreed upon.
- The "Assigned To" column should list the individual or team responsible for the action.
- Set a clear and achievable deadline in the "Deadline" column.
- Regularly update the "Status" column to track the progress of the action item.
- Use the "Notes" column for any additional information, comments, or references related to the action.

Make sure to save and distribute this document to all relevant team members after the meeting for maximum efficiency and follow-up.

Example: Team Decisions and Action Items Tracker					
Meeting Date: June 18, 2024					
Project/Topic: Launch of New Software Feature "WaveSync"					
No.	**Action Item** (What needs to be done?)	**Assigned To** (Who is responsible?)	**Deadline** (When should it be completed?)	**Status** (Where does it stand?)	**Notes** (Any additional info?)
1	Finalize UI/UX design for WaveSync	Sarah Johnson	June 25, 2024	In Progress	Ensure alignment with brand guidelines.
2	Develop initial prototype	Mark Anderson	July 5, 2024	In Progress	Prototype to include basic functionalities.
3	Conduct internal testing of the prototype	Jessica Lee	July 10, 2024	Not Started	Test for bugs and usability issues.
4	Prepare marketing materials (brochures, videos, etc.)	Emily Davis	July 15, 2024	In Progress	Highlight key features and benefits of WaveSync.
5	Schedule a demo for potential clients	Tom Wilson	July 20, 2024	Not Started	Coordinate with marketing for demo content.

Meeting Evaluation

We value your feedback and would appreciate your responses to the following statements and questions about the meeting. Your input will help us continuously improve our meetings.

1. The purpose of the meeting was clearly communicated at the beginning.	☐ Agree ☐ Disagree
2. The meeting's agenda was made available to all attendees.	☐ Agree ☐ Disagree
3. The agenda was adhered to throughout the meeting.	☐ Agree ☐ Disagree
4. The meeting's objectives were achieved.	☐ Agree ☐ Disagree
5. Your personal objectives for the meeting were met.	☐ Agree ☐ Disagree
6. All attendees were encouraged to actively participate in the meeting.	☐ Agree ☐ Disagree

7. Which aspects of the meeting did you find most valuable?

8. Which aspects of the meeting did you find least valuable?

9. Please share any recommendations you have for improving future meetings.

Thank you for taking the time to provide your feedback. Your input is greatly appreciated and will be taken into consideration as we plan and conduct future meetings.

Exercise: Understanding and Defining a Decision/Problem/Situation

Instructions: Identify an important decision or problem that you or your team must address soon. Use the questions below to create context for that decision.

Describe the Decision/Problem:

(Write a brief description here)

Contextual Questions:

1. What specific issue are we dealing with?

- Focus on the core problem, not just the symptoms.

2. What is the broader context of this issue?

- Consider the environment, stakeholders, and external pressures.

3. What are the critical elements of this situation?

- Identify the most relevant aspects needing attention.

4. What is the root cause of this problem?

- Distinguish between root causes and symptoms.

5. What are the immediate and long-term consequences if this issue remains unresolved?

- Understand the impact on the team, project, and organization.

Application of the PDCA Cycle

Example Scenario: Improving Customer Service

Let's consider an example from the tech sector involving a software company's customer service department experiencing high volume of complaints.

1. Plan

- **Identify the Problem**: A company is experiencing a high volume of customer complaints about response times.
- **Set Objectives**: Reduce response times to within 24 hours and improve customer satisfaction scores.
- **Develop a Plan**: Introduce a new customer service training program and upgrade the ticketing system to prioritize urgent requests.

2. Do

- **Implement on a Small Scale**: Launch the training program and new system in one department.
- **Execute the Plan**: Train the customer service team and start using the new ticketing system.

3. Check

- **Monitor and Evaluate**: Track response times and customer satisfaction scores over a set period.
- **Compare Outcomes**: Measure the results against the objectives to see if response times have decreased and satisfaction scores have improved.
- **Gather Feedback**: Collect feedback from customers and the customer service team to identify any issues with the new system or training program.

4. Act

- **Standardize or Adjust**: If the new approach meets the objectives, roll it out to the entire customer service department. If there are areas for improvement, make necessary adjustments to the training program or system.
- **Implement on a Larger Scale**: Apply the refined solution across the company, ensuring all teams are trained and equipped with the new system.

Exercise: How Trustworthy Are You?

So, how trustworthy are you currently? Take this quick self-assessment to find out.

Instruction: Rate yourself on a scale of 1 to 5 for each question, with 1 being the lowest and 5 being the highest.

Do you always tell the truth in your dealings with others?	1	2	3	4	5
Do you make an effort to understand and respect the interests of others?	1	2	3	4	5
Do you speak from expertise in the subjects you deal with?	1	2	3	4	5
Are you sincere in your dealings?	1	2	3	4	5
When you agree to do something, do you always follow through?	1	2	3	4	5
Do you keep confidences?	1	2	3	4	5

Your total score will give you a sense of your current trustworthiness level. If you scored low in any area, don't sweat it! Just focus on improving in that area, one day at a time.

Exercise: Mapping Your Workplace Interdependencies

Part 1: Who Do You Depend On?

Instructions: Complete the table below by identifying two key colleagues from different departments whom you rely on to achieve your objectives.

Name	Department/Role	Nature of Dependency	Reason for Assistance
Example: Chris	Software Development	Integration of a new feature into the product	Chris's expertise in software architecture is crucial for efficiently incorporating the new feature I've designed.
1.			
2.			

Part 2: Who Depends on You?

Instructions: Fill out the table below by reflecting on two individuals or teams that depend on you for their success.

Name/Team	**Relationship to You**	**Nature of Their Dependency**	**Reason for Your Support**
Example: Product Management Team	Collaborators	Feedback on usability testing	My insights help refine the product's user experience, ensuring it meets the end-user's needs effectively.
1.			
2.			

Reflection

After completing these tables, think about the network of dependencies in your workplace.

- How does recognizing these interdependencies impact your approach to leadership and teamwork?
- How can you use this understanding to foster a more collaborative and supportive work environment?

Exercise: Persuading Your Boss to Attend an Industry Conference

Objective: To build a credible case for taking one week off to attend an industry conference, with the aim of enhancing your industry knowledge and expanding your professional network.

Instructions:

1. Reflect on the benefits of attending the conference for both you and your organization.
2. Anticipate three potential concerns or objections your boss might have regarding your attendance at the conference.
3. For each concern, develop a persuasive response that addresses the objection and highlights the benefits of allowing you to attend.

Quick Exercise: Identifying Influence in Your Organization

Goal: Spot non-authoritative sources of influence within your workplace by identifying key individuals and understanding the roots of their influence.

Task: Identify a key influential individual in your organization.

Name:	
Role:	
Root of Influence:	
Brief Explanation: (2-3 sentences on how this influence manifests)	

Exercise: Your Experience with Persuasion

Now, let's see if you can spot situations where persuasion was at play with a little exercise.

Think back over the last few weeks and try to come up with three times when you or someone you work with used persuasion to get a point across.

Ask yourself:

1. What was the goal of that communication?
2. Did the persuader succeed in getting what they wanted?
3. If not, why do you think it didn't work?

Persuader	Goal	Successful? (Yes or No)	If not, why?