Smith
SCHOOL OF BUSINESS
Queen's University

High Performance Teams

Smith School of Business
Business Coaching Group
Master Programs
Queen's University
Kingston, Ontario

7th Edition
The Business Coaching Group
Team & Executive Coaching
Smith School of Business
Queen's University
Kingston, Ontario
Canada

Welcome to the Smith School of Business,

From the day you begin your Master's program until the day you graduate, our hope is that you and your teammates enjoy both a positive and instructive team experience. While we know that the journey each team will take through the Master's experience will be different, our efforts will be focused on providing you and your team with an exceptional learning journey. We trust that this experience will develop your ability to effectively build, manage and lead teams towards high performance.

At Smith School of Business, we believe strongly in the power of teams. Academic research, collaboration with our corporate partners, and alumni feedback supports the concept that expertise in high performance team development is directly related to career success.

This copy of our *High Performance Teams Workbook* is an investment in your competency set. This is a collection of tried, tested and proven best practices to help you reach maximum potential both as a team member and as a team.

It is always a pleasure working with the best and brightest. On behalf of the Business Coaching Group, thank you for the privilege of working with you and for choosing Smith School of Business.

Finally, wherever your working journey takes you, choose to be a great team member. If you are given the ultimate privilege of leading a team, use these tools to lead them well and settle for nothing but high performance!

All the best,

Diana Drury
Director,
Business Coaching Group
Smith School of Business, Queen's University

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Chapter 1

Introduction

The Power of Teams

In today's workplace, business is conducted in teams.
At Smith, you will be part of a team for the duration of the program.
Working with your dedicated Team Coach, you will learn how to quickly elevate your team's performance, increasing efficiency and effectiveness.
You will have hands-on opportunities to practice your leadership and team skills.

What You Will Learn about High Performance Teams:

- To Become a Supportive and Effective Team Member
- To Build Trust and Forge Strong Relationships
- To Develop a Team Contract with Mission, Goals and Norms
- To Apply Best Practices for Efficiency and Effectiveness
- To Communicate with Skill and Positive Intent
- To Debrief for Continuous Improvement
- To Celebrate Successes

What is a High Performance Team?

Work Group

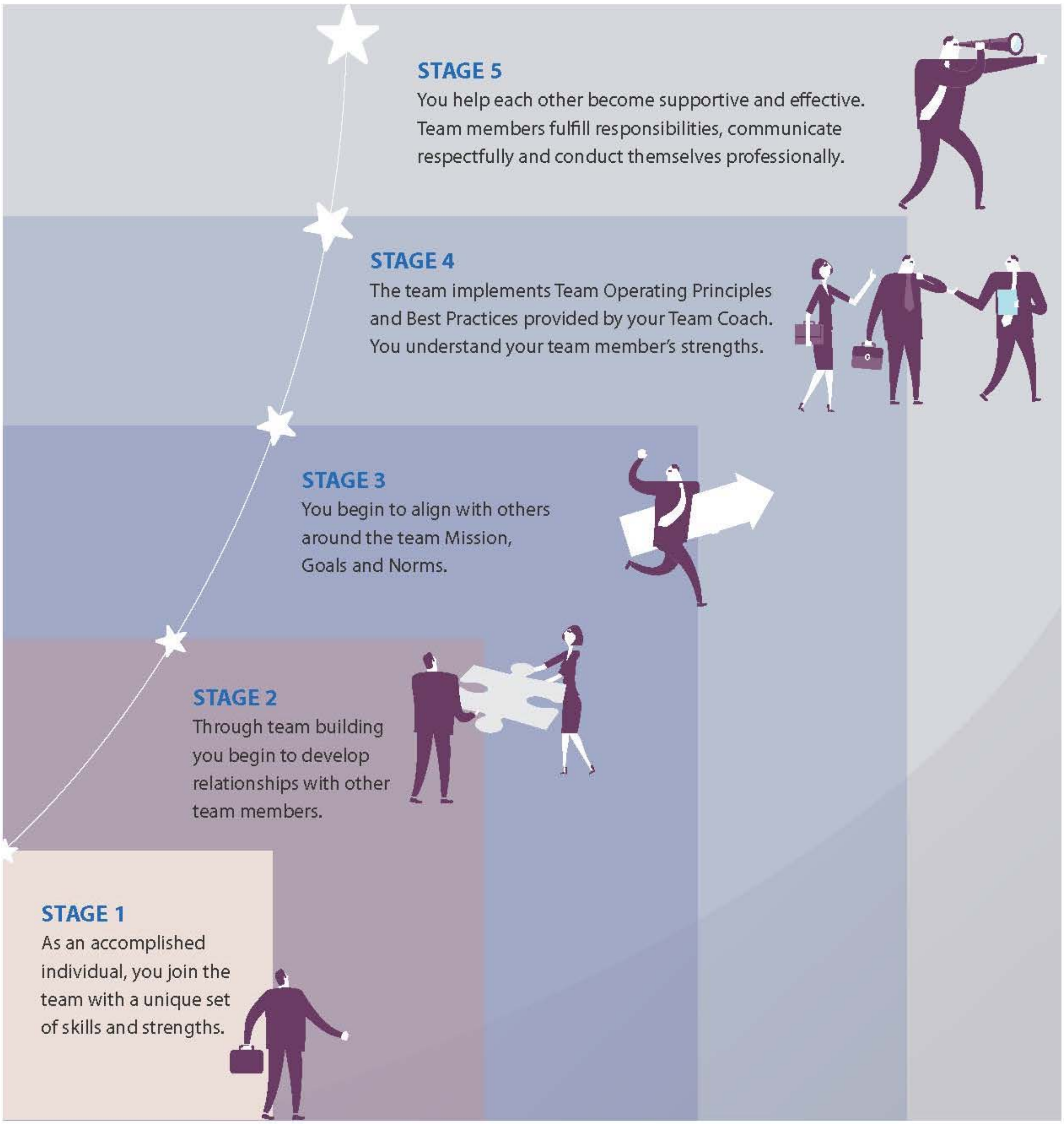
A work group is a number of individuals, greater than three, that come together to share information and perspectives. Members of the group have individual accountability and focus on individual goals. They are concerned with one's own outcome and challenges, and produce individual work products. The purpose, goals and approach to work is shaped by their manager.

High Performance Team

A high performance team is a group of people who share a common mission, set of goals and norms. They collaborate in a ***supportive*** and ***effective*** manner. Members are ***supportive*** by creating a positive team climate that includes trust and acceptance. ***Effective*** team members contribute in a meaningful and valuable way to team projects. Members of a high performing team hold each other accountable to their mission, goals and norms.

> "Teams rely on intense, collaborative work to accomplish a specific goal or task that could not be accomplished as well by an individual or a work group. An effective team increases the productivity, satisfaction and growth of each of its team members, the team itself, and the rest of the organization."
>
> Katzenbach & Smith,
> The Wisdom of Teams: Creating the High-Performance Organization

Team Journey – The Evolution of YOU!



The Evolution of YOU

Your transformation has begun. The moment you entered the program, met some of the program staff and fellow classmates, you began your journey – the evolution of You.

Stage 1:
You've come to the program as an individual star. Someone who has a unique set of skills, talents and aspirations that will enhance the experience of your colleagues.

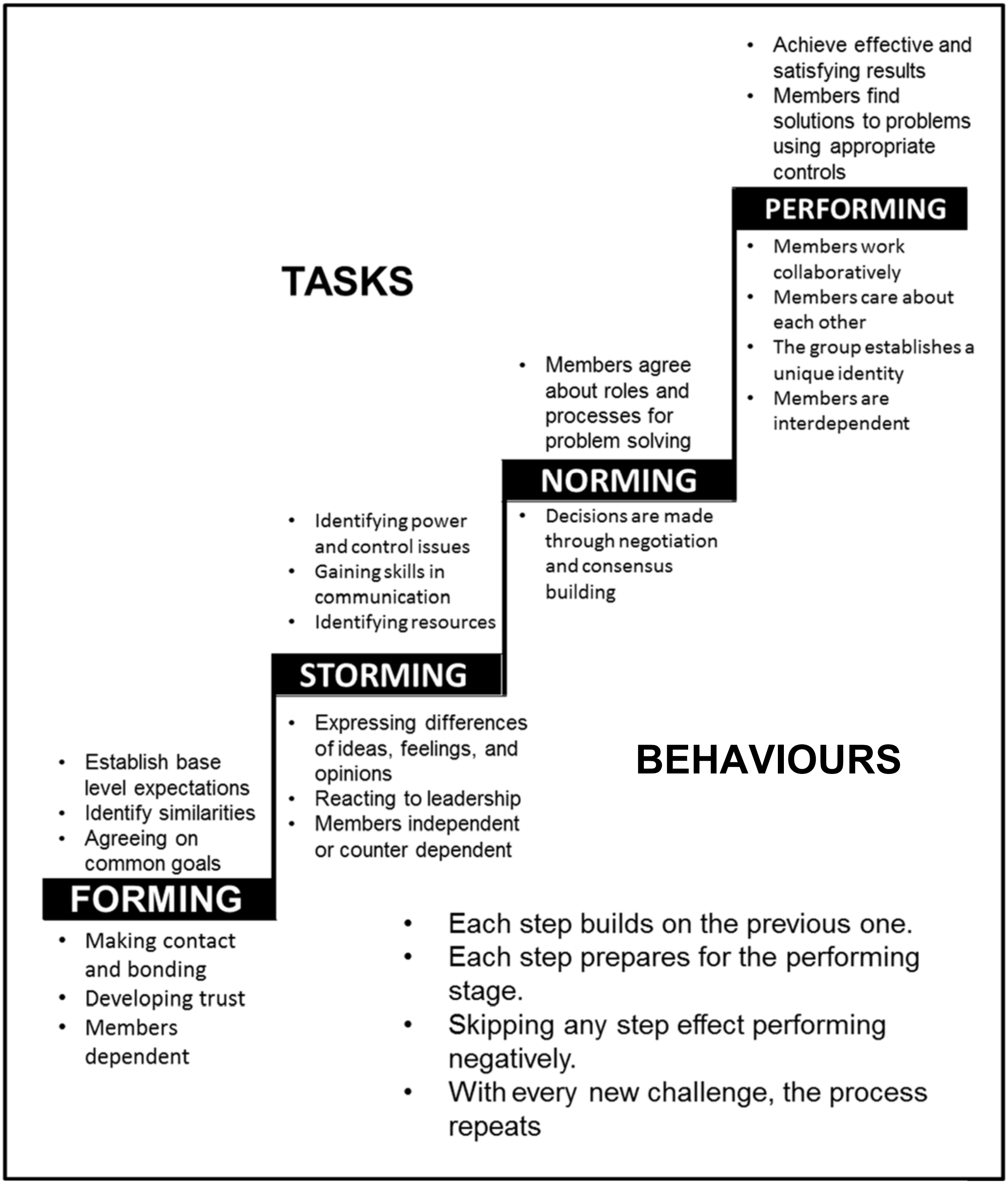
Stage 2:
Your first days will be spent as a member of a working group, comprising of professionals from various disciplines and cultures. Through a series of team building exercises and opportunities to get better acquainted, you will take your first steps toward becoming a team.

Stage 3:
To grow from a working group to a team will depend on many things not the least of which is alignment. Each member's commitment to the mission, goals and norms is essential to how your team will work together. You may have been a high performer when you entered the program, but now you are a peer among other high performers. For those accustomed to leading, learning to follow someone else's plan can be challenging. Evolution is challenging and, at times, frustrating but an improved version of you will emerge.

Stage 4:
With every discussion, deadline, presentation, and debrief, you will gain an appreciation for your strengths and how to leverage the best of your peers to improve your performance as a team. The best practices offered by your Team Coach will help you form the discipline needed to achieve higher performance as a team.

Stage 5:
In a high performance team, members strive to be and help one another to become effective and supportive. Members fulfill their responsibilities, communicate openly, honestly and often, conduct themselves professionally and shoulder the weight of work equally.

Tuckman's Team Development Model



Tuckman, Bruce. Stages of Group Development

Stages of Team Development

Stage 1: "Forming"	Stage 2: "Storming"	Stage 3: "Norming"	Stage 4: "Performing"
• Individuals are not clear on what they're supposed to do. • The mission isn't owned by the group. • Wondering where we're going. • No trust yet. • High learning. • No group history; unfamiliar with group members. • Norms of the team are not established. • People check one another out. • People are not committed to the team.	• Roles and responsibilities are articulated. • Agendas are displayed. • Problem solving doesn't work well. • People want to modify the team's mission. • Trying new ideas. • Splinter groups form. • People set boundaries. • Anxiety abounds. • People push for position and power. • Competition is high. • Cliques drive the team. • Little team spirit. • Lots of personal attacks. • Level of participation by members is at its highest (for some) and it's lowest (for some).	• Success occurs. • Team has all the resources for doing the job. • Appreciation and trust build. • Purpose is well defined. • Feedback is high, well-received, and objective. • Team confidence is high. • Leader reinforces team behavior. • Members self-reinforce team norms. • Hidden agendas become open. • Team is creative. • More individual motivation. • Team gains commitment from all members on direction and goals.	• Team members feel very motivated. • Individuals defer to team needs. • No surprises. • Little waste. Very efficient team operations. • Team members have objective outlook. • Individuals take pleasure in the success of the team – big wins. • "We" versus "I" orientation. • High pride in the team. • High openness and support. • High empathy. • High trust in everyone. • Superior team performance. • OK to risk confrontation.

Action Steps: "Forming" to "Storming"	Action Steps: "Storming" to "Norming"	Action Steps: "Norming" to "Performing"
• Set a mission. • Set goals. • Establish roles. • Recognize need to move out of "forming" stage. • Leader must be directive. • Figure ways to build trust. • Define a reward structure. • Take risks. • Bring group together periodically to work on common tasks. • Assert power. • Decide once and for all to be on the team.	• Team leader should actively support and reinforce team behavior, facilitate the group for wins, create positive environment. • Leader must ask for and expect results. • Recognize, publicize team wins. • Agree on individuals' roles and responsibilities. • Buy into objectives and activities. • Listen to each other. • Set and take team time together. • Everyone works actively to set a supportive environment. • Have the vision: "We can succeed!" • Request and accept feedback. • Build trust by honoring commitments.	• Maintain traditions. • Praise and flatter each other. • Self-evaluate without a fuss. • Share leadership role in team based on who does what the best. • Share rewards and successes. • Communicate all the time. • Share responsibility. • Delegate freely within the team. • Commit time to the team. • Keep raising the bar – new, higher goals. • Be selective of new team members; train to maintain the team spirit.

Chapter 2

Setting the Stage

The Power of One

As an individual, when you chose to embark on this program, you had certain reasons for doing so. These reasons probably included career aspirations, personal development, and academic objectives.

It's important to think about and outline what you hope to learn from this team experience. This might include goals around your own personal development, your own contribution as a team member (being both effective and supportive), as well as your team leadership skills (in both administrative roles and assignment roles).

As a team member, it is valuable to share your individual goals and discuss how they align with your team goals. You may wish to share these goals with your Team Coach.

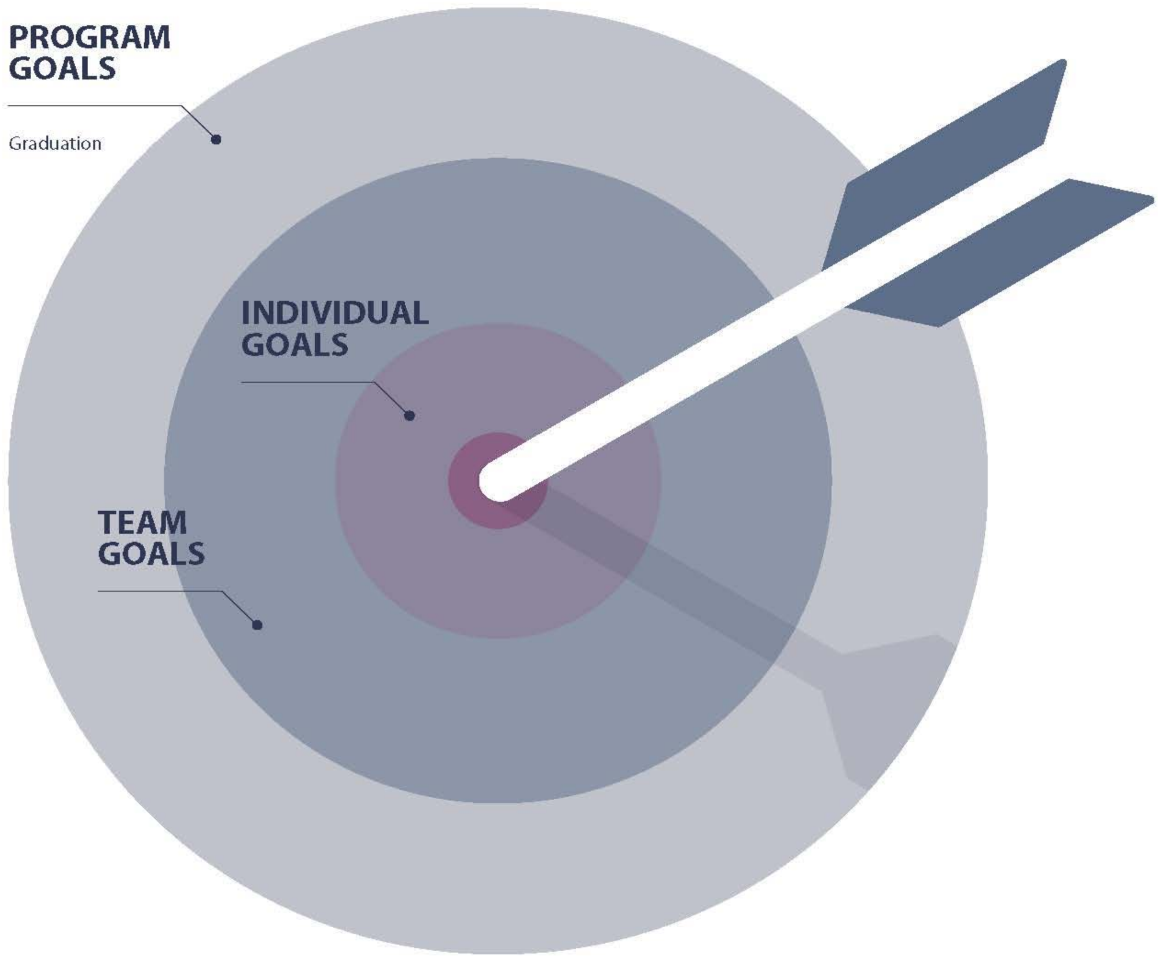
Consider the following categories when thinking about Individual Goals:

- Personal Development.
- My Role as an Effective and Supportive Team Member.
- My Team Leadership Skills (Administrative and Assignment Roles).

To record and share this information use the team inventory spreadsheet.

Individual/Team/Program Goals

Individual goals are important to think about, define and share. They need to be aligned with the teams' goals. The teams' goals should ultimately align with the overarching program goal – to graduate! If you can see how these goals work together then it will be easier to keep on track and stay the course.



Team Inventory

To lay the foundation towards becoming a High Performance Team, an important first step is to take inventory of your skills and potential. More specifically, by identifying your individual strengths and preferences, you will be better positioned to understand and leverage your teammates' experience to succeed in the MBA and achieve your own personal development goals.

Instructions:

Schedule a time to review this document as a team. Each team member prepares a response to the column 'Self' **before** the meeting. At the meeting, each team member presents their self-ratings and results. The Scribe records responses in a master team document.

Section 1:			For each skill, rate yourself using the proficiency scale below: L = Low M = Medium H = High LG = Learning							
YOUR NAME:			Team Member Names							
SKILL:	Ex.	SELF								
Project management (leading projects, delegating, allocating resources, developing timelines, leading discussions)	L									
Math & quantitative skills	M									
Writing skills	M									
Giving & receiving feedback	M									
Conflict Management	H									
Research	LG									
Construction and design of spreadsheets	M/LG									
Creation of PowerPoint presentations	M/LG									
Presentation skills	L/LG									
Organizational skills (time management, prioritizing, scheduling)	H									
Social media skills	M									
Other (Please specify): ________										

Adapted from materials created by Shawna O'Grady – High Performance Teams

Section 2: As a team discuss the following and record your results

A) Additional skills or assessment results you wish to discuss within your team										

B) Identify your *personal learning goals* for the program

C) What your team needs to know about your personal sensitivities and situation. (E.g. family situation, conduct in the team room, life events happening during the school year)

Adapted from materials created by Dr. Shawna O'Grady

Smith School of Business

Cultural Diversity – Individual Cultural Value Orientations

Individuals have personal preferences or individual cultural orientations.

In our own cultures, we usually have an idea of what's going on around us because we have a wealth of information, most of which is subconscious, that helps us make sense of what we experience and observe. When we interact with individuals who have a different cultural background, the same cues may mean something entirely different.

The individual cultural value orientations describe the emphasis (the value) that an individual place on a specific aspect of culture. Where you score yourself on each cultural value dimension does not have intrinsic meaning - it is not "better" to be low or high. Instead, these are descriptions of preferences, and understanding them, as well as those of your teammates, can help you in your interactions where different preferences exist.

Individualism – Collectivism

Individualism 1	Collectivism 100
Individual goals and rights are more important than personal relationships	Personal relationships and benefiting the group are more important than individual goals

Power Distance

Low 1	High 100
Status differences are of little importance; empowered decision-making is expected across all levels.	Status differences should shape social interactions; those with authority should make decisions

Uncertainty Avoidance

Low 1	High 100
Focus on flexibility and adaptability; tolerant of unstructured and unpredictable situations	Focus on planning and reliability; uncomfortable with unstructured or unpredictable situations

Cooperative – Competitive

Cooperative 1 — Competitive 100

Cooperative (1)	Competitive (100)
Emphasis upon cooperation and nurturing behaviour; high value placed upon relationships and family	Emphasis upon assertive behaviour and competition; high value placed upon work, task accomplishment, and achievement

Time Orientation

Short Term 1 — Long Term 100

Short Term (1)	Long Term (100)
Views the future as unpredictable; values immediate outcomes more than long-term benefits (success now!)	Values long term planning; willing to sacrifice short-term outcomes for long-term benefits (success later)

Context

Low 1 — High 100

Low (1)	High (100)
Emphasis on explicit words; values direct communication	Emphasis on harmonic relationships and implicit understanding; values indirect communication

Being – Doing Orientation

Being 1 — Doing 100

Being (1)	Doing (100)
Social commitments and task completion are equally important; diffuse boundaries between personal and work activities	Task completion takes precedence over social commitments; clear separation of personal and work activities

Chapter 3

Team Operating Procedures (TOPs)

The Power of Process

Teams reach high performance by applying and staying disciplined to Team Operating Procedures. These procedures provide the structure for maximum efficiency and effectiveness.

What you will Learn about Team Operating Principles:

- Assignment Process Flow and Planning
- Administrative and Assignment Roles
- Meeting Basics and Templates
- Sample Assignment Planning
- Multi-City Team Success Factors
- Virtual Desktop Team Best Practices

Assignment Process Flow

The Lead and Second

- Lead is selected by the Team during an Admin meeting
- Selection is based on interest and equity

The Assignment Plan

- Lead creates a draft assignment plan
- Lead presents the plan for discussion, adjustments and approval at an Admin meeting
- Team approves the assignment plan
- Team agrees to and abides by the approved plan thereafter

Individual and/or Group work

- Various individuals or sub team work on the assignment as planned
- Everyone come to the working session with pre-work completed and are “prepared to go first”

The Working Session

- Chair — Manages time and participation
- Lead — Facilitates the session, takes work away for compilation
- Second — Takes notes for the Lead
- Individuals or Sub team — Present work to the rest of the team for review, discussion, agreement, etc.

The Assignment

80% → 95% → 100%

- Lead works on draft to approx. 80% level, sends to Second for review
- Second reviews draft, sends feedback to the Lead
- Lead and Second collaborate until draft is 95% complete
- Lead sends 95% draft to team for review
- Team reviews draft, sends feedback to the Lead
- Lead considers Team’s feedback, incorporates what they deem relevant and takes assignment to 100%
- Lead submits to University before due date/time, posts final version for team file

Final Debrief

- Team debriefs assignment process as soon as possible after submission
- Team discusses what worked, what didn't work and what to do differently next time
- Team provides feedback to Lead

From an original concept developed by Dr. Shawna O’Grady

Administrative Roles Overview

CHAIR

- rotates monthly
- prepares agendas with input from assignment leads
- reserves room and sends out meeting invitation and reminders
- manages the meeting according to team norms
- keeps track of time and participation during meetings
- guides team toward making decisions
- leads meeting debriefs at end of every meeting (admin and working session)

SCRIBE

- rotates monthly
- records all decisions and action items (name, due date, status) from team meetings
- sends out meeting notes to all team members
- keeps track of 'lessons learned' from debriefs
- becomes the Chair in the next cycle

SCHEDULER

- typically program long
- maintains a team calendar (accessible to all members that includes such things as team assignment deadlines, individual assignment deadlines, exam dates, tutorial dates, significant member commitments, etc.)
- keeps the team calendar current and makes it accessible to the team
- brings the calendar forward at Administrative meetings when the team is planning for upcoming assignments and workload requirements

Assignment Roles Overview

ASSIGNMENT LEAD

- "Project Lead" for the assignment – creates and oversees the Assignment Plan
- liaises with the professor for the assignment
- manages the assignment as per the Assignment Plan
- ensures a thorough debrief of the assignment is completed as soon as possible after the assignment has been submitted

ASSIGNMENT SECOND

- may be a subject matter expert
- may assist with creating the Assignment Plan
- collaborates with the Lead to determine his/her role in the working session and assignment creation process
- actively participates in the assignment along with the rest of the team
- actively participates in the assignment debrief

REMAINDER OF TEAM

- actively participates according to the assignment plan
- completes work as allocated in the assignment plan

The Roles of Assignment Lead & Second

The duties of a Lead are to:

- Review the assignment criteria as soon as the assignment is available from the professor.
- Do the appropriate research and legwork to ensure that they understand what the assignment requires.
- Create a clear and detailed Assignment Plan that responds fully to the needs of the assignment.
- Present the Assignment Plan to the team in an administrative meeting to gain alignment and agreement from the team.
- Revise the Assignment Plan as needed, to incorporate the feedback from the team.
- Delegate the work appropriately to respond to the needs of the assignment, and the strengths or learning goals of the team members.
- Design a suitable and appropriate timeline.
- Lead a productive team working session for the assignment.
- Encourage individual team members to contribute high quality work and input in the working session.
- Hold other team members accountable for the content and quality of the work they submit in keeping with the norms of the team.
- Produce a first draft of the assignment that incorporates the input of the team.
- Produce a first draft of the assignment that adequately answers the question(s) being asked.
- Produce a first draft of the assignment that is written and structured appropriately and meets the standards of the team.
- Provide an 80% draft to the Second that is workable (should not have to be completely restructured or substantially rewritten by the Second).
- Communicate with the team members pro-actively as the assignment evolves.
- Be accessible to the team members, as needed, as the assignment evolves.
- Respond in a timely manner to questions or queries from team members throughout the duration of the assignment.
- Adhere to the timeline described in the Assignment Plan, or adjust the timeline as required, with appropriate consultation with team members, during the course of the assignment.
- Proactively communicate to the team any changes in scope, requirements or the timeline of the assignment.
- Work supportively and effectively with the Second to bring the project from at least 80% complete to at least 95% complete.
- Provide to the team a 95% draft that is representative of the quality of the work of the team.
- Use best judgment to incorporate the feedback of the team into the final product.
- Do a spell and grammar check on the document.
- Ensure that all citations (if needed) are included.
- Submit the final deliverable on time.
- Lead a thorough team debrief of the assignment at the team's next Administrative Meeting after the assignment has been submitted.

The duties of a Second are to:

- Support the Lead at all stages of the assignment creation process to produce a quality deliverable for the team.
- Help the Lead review the assignment requirements, if requested.
- Help the Lead prepare the Assignment Plan, if requested.
- Take notes for the Lead at the working session if the Lead requests.
- Look for ways to fill any gaps the Lead may have in their skillset as those gaps pertain to the specific assignment and may interfere with the generation of a quality product.
- Ensure that the 80% draft provided by the Lead answers the question(s) being asked.
- Play devil's advocate or offer a critical eye to find potential weaknesses in the content of the 80% draft.
- Offer suggestions or solutions to those potential weaknesses, to enhance the assignment.
- Provide a check and balance role, making sure everything is in the 80% draft that should be and that the draft meets or exceeds the assignment requirements.
- Provide specific feedback to the Lead as to how to improve the draft before it is sent out by the Lead to the rest of the team (help to move the draft from 80 – 95%).
- Meet all deadlines as dictated by the Assignment Plan.

Team Basics

High performing teams meet when they need to, and structure their time together in different ways to achieve different outcomes. There are four main types of team interaction:

1. ***Administrative or organizational meetings***: team members take care of the “business” of the team;

    - assigning roles,
    - reviewing assignment plans,
    - debriefing recent submissions,
    - planning social activities, and
    - reviewing calendars.

2. ***Working sessions***: team members work on the content of their assignments;

    - sharing their research,
    - reviewing answers,
    - brainstorming,
    - discussing options,
    - making decisions, and
    - some teams opt to meet for optional shared studying sessions as well.

3. ***On-going Interaction:***

    - team members are in constant communication,
    - checking in with each other,
    - helping and supporting each other on course related and personal challenges.

4. ***Team trust building activities***:

    - team members interact socially away from the team room,
    - suggestions could include: outdoor activities, meals together, sporting events.

Administrative Meeting Agenda Sample

Meeting Time and Date	
Location	
Chair	
Scribe	
Attendees	

Agenda Items:

	Item	Prep required	Time	Who
1.	2-minute check-in			
2.	Review of agenda			
3.	Review of Actions/Decisions from previous meeting			
4.	Review of calendar			
5.	Review Mission, Goals and Norms			
6.	Identification of Leads/Seconds to be assigned			
7.	Review of Assignment Plans for upcoming assignments: a. MBUS830 – Case Analysis b. MBUS801 – Question Set	 Read assignment Review Question Set	 15 mins 15 mins	 Bill Cooper Manoj Singh
8.	Debriefing any recently handed in assignments 1. MBUS829 – Starbucks Financial Analysis and Presentation	 Think about what worked/didn't work/could have been better from a process perspective.		 Sarah Keefe
9.	Chair Debrief			
10.	Wrap-up and Meeting Debrief			
11.	Compile & Review Lessons Learned		5 mins	Scribe

First Administrative Meeting Agenda

After the Opening Session meeting has been delivered (Action items from that meeting)

First Admin Meeting Checklist:

	Item	Prep required	Time	Who
1.	2-minute check-in.			
2.	Review of agenda.			
3.	Assign Chairs & Scribes for duration of program.			
4.	Assign Leads and Seconds for assignments posted on portal.			
5.	Complete and Discuss the Team Inventory.			
6.	Review and revise MGNs document per feedback from coach.			
7.	Discuss and decide when and where the team will hold Administrative Meetings.			
8.	Discuss and decide when and where the team will hold Working Sessions – agree to block this time as a placeholder in everyone's calendar.			
9.	Discuss and decide what technology the team will use for file sharing, as well as a naming standard.			
10.	Discuss and decide what technology the team will use for communication between classes.			
11.	Discuss and resolve any concerns that team members may have personally or in the team.			
12.	Send Chair/Scribe schedule and revised Mission, Goals and Norms to the Team Coach			
13.	Debrief the Chair.			
14.	Debrief the Meeting.			

Working Session Agenda Sample

Meeting Time and Date	
Location	
Chair	
Scribe	
Attendees	

Agenda Items:

	Item	Prep required	Time	Who
1.	2-minute check-in			
2.	Review of agenda			
3.	Assignment 1			
4.	Assignment 2			
5.	Assignment 3			
6.	Other			
7.	Lead Debrief for each Assignment			
8.	Chair Debrief			
9.	Meeting Debrief			
10.	Compile & Review Lessons Learned		5 mins	Scribe

Process for Planning Assignments

To have the best possible outcome in the completion of a team assignment, planning is crucial. The Lead is responsible for creating and overseeing execution of these Assignment Plans.

The Lead will create the assignment plan, with the help of the Second. The creation of the plan requires a thorough understanding of what is being asked of the team. This may require additional research and/or conversation/email with the professor to ensure clarity and comprehension. The Lead needs to think through how best to allocate the available resources.

The Lead will detail the plan with the team using an Administrative Meeting to ensure that everyone is focused on the approach outlined.

There are four main elements to the Plan:

<u>The "WHAT"</u>
The Lead should be familiar enough with the requirements of the assignment to provide the team with a description of what exactly the professor is asking of the team. Questions the Lead might address are:

- What is the purpose of the assignment?
- What is the assignment all about?
- What are the deliverables?

<u>The "HOW"</u>
The Lead will identify the approach he or she would like to take, including the preparatory work that the team members might need to do. Questions that the Lead might address are:

- How will the team approach the assignment?
- How should the team members prepare for the working session?

<u>The "WHO"</u>
In a team assignment, the work is usually distributed among all the members in a way that leverages the skills and learning goals of the members. The Lead will provide a detailed breakdown of the work for each person on the team, and address the question:

- Who will do what?

<u>The "WHEN"</u>

A detailed timeline will be most helpful to the team members. It will allow each person to organize their own workflow and be accountable for every one of their deliverables for the assignment. In the Plan, the Lead will address the question:

- By what date and time will each team member have completed the different requirements as assigned?

Qualitative Assignment Plan Sample

Course/Assignment	MBUS369 – Business Decision Modelling - Assignment #4
Lead	Lara
Second	Santiago
Due Date	October 28 @ 11:59:59 pm to Course Portal
Value (%)	50% = MAJOR!!

Overview

Purpose of assignment, what is it about, deliverables

- Case Analysis – Eureka: Preparing for the Future vs. Hoover: Leading the Way

Assignment issues/notes/context

- Team assignment constitutes a major course mark, 50% of final grade
- Case study, complex, similar to MBUS436 - TMP and Millennium Computers, which means that face-to-face team contact is crucial in reducing the work load
- Prof has own publications, regurgitating this back to him will look good
- Endnotes are required (WORD Menus: insert, reference, footnote, and change to endnote), see the back of articles for examples

Assignment Requirements:
- 20-page report comparing the strategic decision-making process of the 2 firms
- The report must include several pages of current web-based research

Execution

- We will execute this in sub teams as follows:
- Each pair noted below will develop a draft in bullet point format
- Sub Leads are listed first
- Target about 4 double spaced pages, 12-point Arial, 1” margins, plus one exhibit for each Sub team
- Course concepts only, no fluff

Question 1: Evaluate the extent to which Eureka’s non-market strategy complemented its market strategy in competing with Hoover. (Saleem/Lara) Check out article Session 3, “Non-market strategy…”

Question 2: How has Hoover been able to take market share from Eureka? How should Eureka counter these efforts? (David/Santiago)
Question 3: What lessons does this commercial rivalry hold for others businesses? (Inez/Michael) Compare especially to other business outlines in the course, and also your own businesses (Inez and Michael both work for Global businesses)
Question 4: The two assigned cases present very different views of the Eureka-Hoover rivalry. Weigh the evidence from both cases against your *own background research* in presenting your arguments, recommendations for Eureka, and the implications for business more generally. (Sanket/Olga) You will have to communicate regularly with sub teams to put this stuff together.

Timeline

<u>October 2 – October 15</u>
- Work on sub team drafts

<u>October 15 at 6:00pm</u>
- Distribute sub team work for review prior to working session

<u>October 16 at 1:30 pm - Team Working Session</u>
- Working session – come prepared with all pre-work done as per the above sub-team list
  - Come with a soft copy of your work – bullet points in Word – each sub team should update their file and email to Lara, upload to shared drive at the end of the working session

<u>October 20 at 9:00pm</u>
- Lara (Lead) sends the 80% draft to Santiago (Second)

<u>October 24 at 8:00-9:00pm</u>
- Santiago and Lara collaborate to create the 95% draft – Skype for Business

<u>October 24 at 9:00pm</u>
- Lara sends the 95% draft to the team

<u>October 26 at 9:00pm</u>
- Team sends any final comments to Lara

<u>October 28 (Due date) at 11:59:59 pm local time</u>
- Lara submits 100% Final to Queen's

<u>November 1 at 8:30 am</u>
- Lara leads assignment debrief at Administrative Meeting

Quantitative Assignment Plan Sample

Course/Assignment	Statistics – Assignment #4
Lead	Saleem
Second	Inez
Due Date	November 16 @ 11:59:59 pm to Course Portal
Value (%)	20%

Overview

Purpose of assignment, what is it about, deliverables

- Questions 1-10 from the Statistics textbook, Chapter 4

Assignment issues/notes/context

- Questions 1-5 are independent of each other – appear relatively straight-forward
- Questions 6-8 build on each other and need to be done by the same sub-team
- Questions 9 and 10 are independent, yet complex – will probably take quite a bit of time and analysis
- Questions 9 and 10 also have a written component to discuss recommendations

Assignment Requirements:
- All quantitative work must be submitted in Excel
- Written component is a Word appendix

Execution

- Each group below will develop the work as assigned
- Recommendation is that each individual does the work on his/ her own first, then the team comes together to compare answers and processes
- Sub-team should prepare/design the best answer to present at the team's working session

Saleem / David / Olga - Questions 1-3 and 9
Inez / Sanket – Questions 4-5 and 10
Lara / Santiago / Michael – Questions 6,7,8

Timeline

<u>November 1-5</u>

- Individuals take first attempt at completing work on their own

<u>November 6-9</u>

- Sub-teams get together to review individual work and create 'best answer' at 95% level

<u>November 9 at 6:00pm</u>

- Distribute sub team work prior to the working session
- Everyone to REVIEW independently before working session November 10

<u>November 10 at 3pm</u>

- We will go through the assignment in order. Each sub-team must come prepared to present their work, along with process and analysis (semi-tutorial) so everyone understands and agrees on answer
- Expect that we can get through Q1-5 fairly quickly (30 minutes) but Q6-10 may take up to 60 minutes
- Sub-teams send edited final work to Saleem (Lead) at end of working session

<u>November 10 – after working session</u>

- Saleem will take all team submissions and compile into one document for Smith School of Business

<u>November 12 between 9:00-10:00pm</u>

- Saleem (Lead) and Inez (Second) review documentation – meet at Starbucks – Saleem to bring laptop
- Ensure consistent formatting and ensure that nothing has been missed

<u>November 13 at 9:00 pm</u>

- Saleem sends the 95% draft to the team

<u>November 15 at 9:00pm</u>

- Team sends any final comments to Saleem

<u>November 16 (Due date) at 11:59:59 pm</u>

- Saleem submits 100% Final to Queen's

<u>November 20 – Admin Meeting – 9 am</u>

- Debrief Assignment

Analytics Assignment Plan Sample

Course/Assignment	MBUS851 – Business Analytics Team Assignment
Lead	Rob
Second	Shaheen
Due Date	Report - October 31, 2018 at 11:59 pm to the Course Portal Presentation – October 28 2018 in class
Value (%)	Report – 25% Presentation – 25%

Overview

Purpose of assignment, what is it about, deliverables

This assignment requires us to analyze a data set of our choosing, to interpret this analysis through the lens of a business problem/question and draw conclusions/make recommendations to management.

This assignment has 2 components:

1. 10 minute in class presentation with a 5 minute Q&A following
2. 10 page report, double spaced, 12 font, 1 inch margins, including screenshots of our analysis in SAS and/or R

Assignment issues/notes/context

- The data set should represent a real-world business problem/challenge.
- Both the report and presentation must include background information on the company, a description of the data to be used and a summary of the current situation, including competitor's analysis if relevant.
- In addition to the above, the presentation needs to include a high-level description of the analysis completed but should focus primarily on the conclusions and recommendations to management.
- In addition to the above, including the presentation, the report should also include a detailed explanation/rationale of how/why the analysis was undertaken.

Execution

- We will execute this in sub teams as follows:
    - Claire (our tech/coding expert) & Pavel (our business mind) – Creation of models in SAS and R, coding etc.
    - Pawandeep & Shaheen – Report based on inputs from Claire & Pavel and Kevin & Rob, research on competitors as needed
    - Kevin & Rob – Presentation, background research on company

Timeline

Sunday October 7 – Working Session at 11:00 am

- Everyone is to come with a dataset to present to the team. Your "show and tell" should include details about what the business problem/challenge is that the data analysis would answer as well as any pertinent information that would be helpful.
- We will also discuss what type of analysis would best be used for the dataset selected.
- At the conclusion of this meeting we will have made our selection of which dataset to use as well as what type/s of analysis will be conducted.

Friday October 12 – 9 pm

- Claire & Pavel to have data cleaning complete

Saturday October 13 – 9 am – Claire's condo

- Claire and Pavel will meet to code/complete analysis.
- Everyone is welcome to attend, you just need to confirm with Claire, but it is not required for people to attend.
- This may take all day! So be prepared to work long and hard!!

Sunday October 14 – Working Session – Conference Call via Skype for Business – 9 pm

- Claire and Pavel will walk us through their analysis in SAS and R, share screen if necessary.
- We will discuss the findings and conclusions.
- We will also ensure that we highlight the connections back to any pertinent course content.
- Pawandeep will take notes to ensure that all pertinent information is captured for the report writing.
- At the end of this meeting we will have agreed upon our key findings, conclusions and recommendations.

Wednesday October 17 – 9 pm

- Claire and Pavel to send Shaheen a 2 page bullet form summary of how the analysis was conducted including the rationale and any screenshots that should be included as appendices or in the presentation.
- Kevin & Rob to send Shaheen a 2 page bullet form summary of the background of the company and the problem at hand.

Saturday October 20 – 9 pm

- Pawandeep & Shaheen to share the 80% document with Pavel via Dropbox.

Sunday October 21 – Working Session – 11 am

- Kevin & Rob to walk the team through a skeleton of the presentation based on all of the information presented to date.
- This is our chance to ensure that the presentation meets the expectations of the professor and that our presenters have a solid understanding of the analysis conducted.
- By the end of this meeting we will have the shell of our presentation finalized so that Kevin & Rob can go away and make it "pretty" as well as their own.

Sunday October 21 – 9 pm

- Pavel to have completed review and edit of the Report.

Monday October 22 – 9 pm

- 95% draft of Report sent to team for feedback/comments.

Tuesday October 23 – 9 pm

- Team to have completed review of Report.

Wednesday October 24 – 9 pm

- Final Report available for Kevin & Rob to use if/as needed for their Presentation.

Saturday October 27 – Presentation Rehearsal – 9 am

- Kevin & Rob will practice the presentation in the classroom 3 times.
- After each practice run it is expected that everyone on the team will provide feedback.
- If any tweaks/corrections are needed to the presentation Claire (cause she's great at PPT!) will do this real time so that Kevin & Rob can focus on presenting.

Sunday October 28 – In class Presentation

Monday October 29 – by 11:59 pm

- Rob to submit the final Report to the course portal per our norm of 48 hours in advance of actual deadline.

Wednesday October 31 – 9:30 pm/Immediately after class – Admin Meeting

- Debrief the process lead by Rob.

Best Practice Checklist – To Get You Started

Business teams and the teams that have preceded you in the program have created and identified many practices that, if applied, will help you to be successful. These best practices are listed below. Some have associated tools that we will share with you over time; others will require you to bring your own experiences to the table.

High performing teams apply most, if not all, of the following practices. The teams that are most successful make an effort to implement these as soon as possible. High performing teams:

- ☐ Spend as much time face-to-face as possible while forming as a team.
- ☐ Establish and practice open and honest communication. This includes, but is not limited to, keeping everyone in the loop, providing feedback, both positive and constructive, in a clear and timely manner.
- ☐ Establish a set of behavioural practices or norms that define the expectations the members have for themselves and for each other. Ensure they are meaningful, and that you hold each other accountable to them.
- ☐ Organize their meetings with clear roles, clear and appropriate agendas, reasonable, achievable goals.
- ☐ Follow the recommended process to completing assignments for the program.
- ☐ Align themselves with the mission of the team – even if individuals have slightly different goals.
- ☐ Respect and embrace the diversity of team members, their perspectives and experiences.

Virtual Teams at Queen's – Additional Best Practices

Here at Smith School of Business, we have many years of experience coaching teams to academic success and helping them to create a rewarding personal and team experience within the virtual environment. Applying the following best practices, will help you to be successful.

Best Practices

High performing virtual teams apply most, if not all of the following practices. The teams that are most successful make an effort to implement these as soon as possible. High performing teams:

- Spend as much time, "face to face" together in the virtual environment while they are forming as a team.

- Commit and adhere to regular meeting (administrative and working) times for the duration of the program.

- Invest time in social bonding and trust building activities such as establishing a virtual water cooler for social interactions, and scheduling regular virtual social activities (on-line trivia, etc.). Have some fun!

- Familiarize themselves with the technologies they will use as early as they can. Ensure you are choosing the right method of communication for each task – do not always default to using videoconference or instant messaging.

- Establish on-line protocols such as cameras always on, audio muted when not speaking, hand signals for meetings to ensure that everyone is heard, to avoid multiple people speaking at the same time, etc. (These may evolve over time, but early implementation is important)

- Rely on strong Chairs to ensure inclusiveness, order and efficiency. The Chair should conduct a review of Action Items and Decisions Made at the end of ALL meetings.

- Develop excellent feedback processes and skills to compensate for the lack of in-person connection.

- Follow all of the process best practices that apply to all teams with respect to production of assignments. It is important to take time to ensure everyone is on the same page early in the assignment process.

- Over communicate – Virtual teams need to communicate often and through different means. Facial expressions are not as obvious in a virtual setting, so be sure you are communicating what you really want and need.

Multi-City Teams at Queen's – Key Success Factors

There are three keys to success for multi-city teams: initial team set-up and support, early discipline and ongoing willingness to commit to a core set of unique team practices. Each of these is described below.

Three Key Success Factors:

1) Team Set-up and Support

- Team members from multi-city teams need to attend the opening session together. Coming to the opening session together is an excellent way to ensure the success of a multi-city team because it allows the team to complete team building exercises together to build a strong foundation face-to-face.

- Team members require the appropriate support technologically to be able to meet effectively and complete the work requirements of the program. Teams need to be provided with enough videoconferencing time to allow the team to meet for up to six hours of meeting time per two weeks of classes (for team projects and assignments) and an extra two hours for administrative meetings per two weeks of classes.

2) Early Discipline

- Team members need to commit as much time as possible to the multi-city team during the opening session so they can get to know each other's strengths and weaknesses, align toward a common purpose, establish a clear set of goals and norms, and organize the team around specific roles and responsibilities.

3) Unique Multi-City Team Practices

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- A higher level of organization and structure is required to make multi-city teams work. For example, multi-city teams make use of the private videoconferencing time provided to teams between team sites before class and during the lunch break to conduct administrative meetings and to stay connected socially. Making the most of all meeting time is a practice of high performing multi-city teams.

- A higher level of preparation on the part of team members is required. Otherwise, the team meeting may not be as valuable as a face-to-face team meeting. The good news is that with a high level of preparation the meetings are often more efficient and effective.

- Multi-city team meetings require a highly effective Chair who is prepared to take the lead in calling upon members to provide input and ensure an organized flow of information. A Chair who is experienced ought to be chosen to lead the first month of meetings and get the team off to a great start. Others can then emulate his or her leadership.

- It is essential that team members become comfortable with the technology in the videoconference site, videoconferencing technology as well as portal resources for efficiency and effectiveness. Multi-city teams should NOT rely on one member of the team for this because this member might get sick or be away traveling on a weekend. It is imperative that every member be up to speed technologically and feels comfortable with the technology quickly. Resistance to technology can impede a virtual team's success.

- Multi-city team members need to understand that nuances in body language and facial expression are impossible to pick up as you would when you are in the same room with one another. This has pros and cons for a multi-city team but must be taken into account. One advantage is that people are less likely to see people becoming annoyed over silly things that may pass. However, there is also a disadvantage in not seeing real underlying conflicts building.

- Communication must be more explicit and direct. Multi-city team members cannot assume that others will know what they mean or that a message has been sent through nonverbal communication.

- Respectful and proper email etiquette should be adopted (avoid emotional outbursts or tones that may be easily misinterpreted). Because multi-city teams rely heavily on technology, they must be very professional and think carefully about what gets committed to writing in an email message.

- It's important to continue to mix team members from each site on projects and work assignments to ensure you get the most out of the graduate experience.

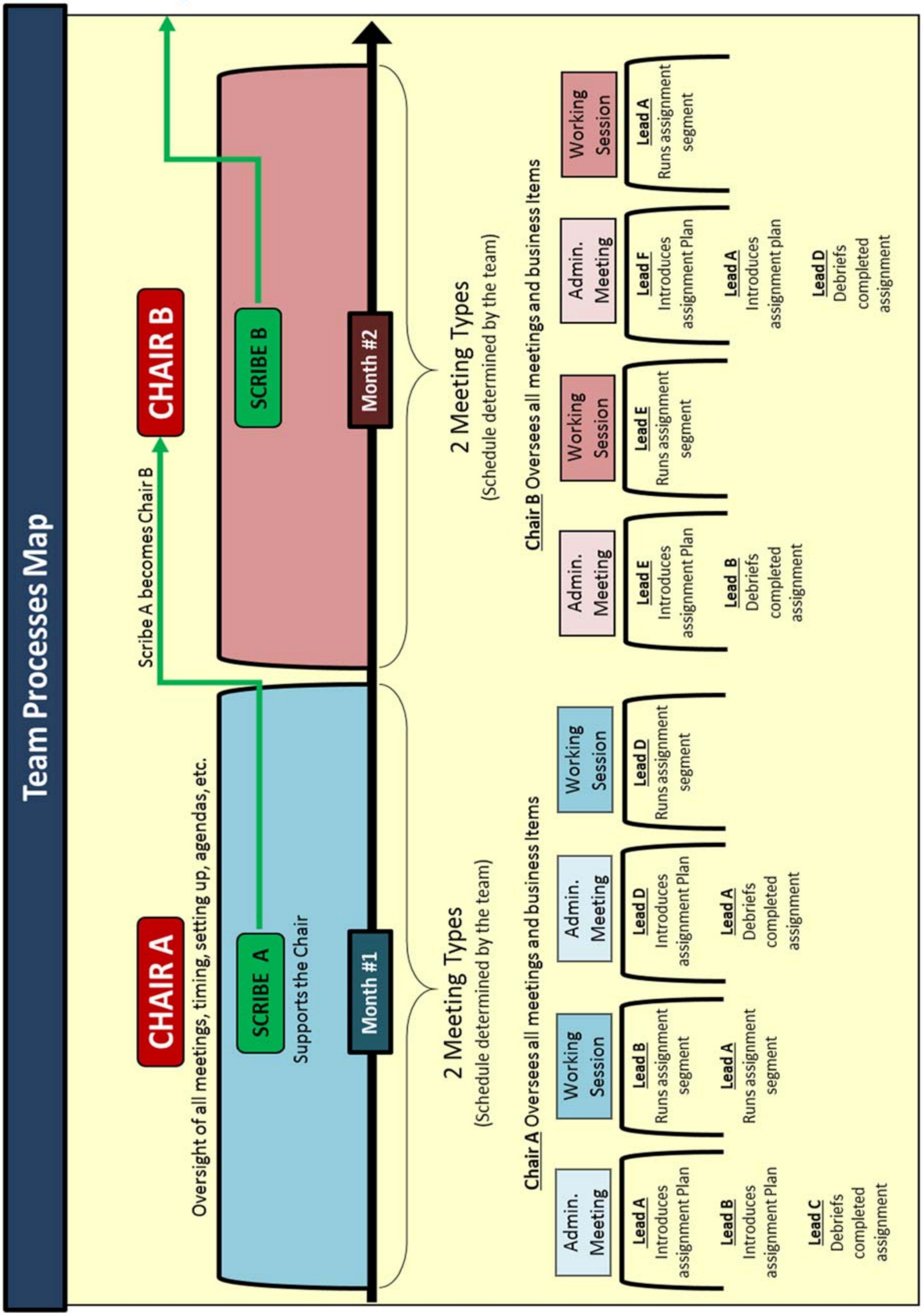
- When working with someone from your own site, you can meet in person to benefit from the social aspect of the team. Similarly, you may want to utilize the team members from the local sites to study together or to sub-group on aspects of team work that can be broken down before coming back together to the larger team to report what you have come up with. This will make the experience more personal.

- Some multi-city teams spend a weekend together in each other's site so that they can "all be together". This enhances the bonding and trust building aspects of the team.

- Debriefing team assignments, team meetings, etc. is a must. This is true in all teams. The difference is that there will be a tendency for the members of each city site within the multi-city team to discuss the meeting as a unit in their own location. To prevent "sub-teams" from developing, there is a real need to schedule this debriefing time into the meeting time to ensure a "one-team" approach is fostered.

- It's important to do as much as possible during the residential sessions in terms of planning workload assignments and settling issues and concerns. The more you can accomplish while you are physically together, the easier it will be for you when you return to your city sites.

Team Processes Map



Chapter 4

Communication and Debriefing

The Power of Communication

High Performing Teams gain efficiency through constant feedback.
Constructive feedback will ensure that the team achieves its mission and goals while operating within its norms.

What You Will Learn about High Performance Team Communication:

- Communications Skills – Giving and Receiving Feedback
- Debriefing Assignments
- Debriefing Administrative Meetings
- Documenting Lessons Learned
- Team Troubleshooting

Communication Skills – Giving and Receiving Feedback

In your teams, you want to set a climate where giving and receiving feedback is the norm. Positive feedback involves telling your team members what they did well. Constructive feedback involves telling your team members where they can build and improve.

Both types of feedback increase self-awareness, encourage development, improve team performance and strengthen relationships between team members. The feedback you give and how you deliver it says a great deal about your values and what you focus on in others.

The highest-performing teams provide positive feedback at least ***three times more often*** than constructive feedback[1]. These teams also ask more questions of one another to elicit feedback.

How to Give Positive Feedback

1. Focus on the individual and his/her strengths.
Consider what strengths your team member is bringing to this situation that you admire and appreciate. Some examples might be attention to detail, the ability to see the bigger picture, or openness to new ideas.

2. Focus on the actions.
Describe the behaviour you saw or heard and appreciated. Some examples might be a Second taking detailed notes during a brainstorming session, a team member's solid preparation for a working session, or when a Lead is able to draw strong contributions out of the team.

3. Repeat, repeat, repeat.
Sharing positive feedback frequently on your team may feel awkward at first. It is a skill, and will become easier with practice.

How to Give Constructive Feedback

1. Be specific.
Pinpoint the specific behavior you would like to see changed and suggest what the person could do differently. For example, "When you give presentations, it would be better to make more eye contact with the audience."

2. Offer constructive alternatives.
Suggest what the person could do differently. For example, "Instead of reading directly from your notes, try referring to the bullet points in the slides."

[1] Fredrickson, Barbara, *Positivity: Groundbreaking research reveals how to embrace the hidden strength of positive emotions, overcome negativity, and thrive* (New York: Crown Publishers, 2009)

3. Describe rather than evaluate.
Tell the person what you saw or heard and **the effect it had on you**, rather than saying the behavior was good or bad. For example, “As the Lead on this project, I appreciate your suggestions on the draft of this assignment. When you do not write me anything, I can’t be sure you have read the draft. I get frustrated when I have to wait for feedback in order to proceed, and the feedback doesn't come.”

4. Own the feedback.
Take responsibility for the feedback you offer, by beginning with “I think that…” or “In my opinion…” It can be easy to say to the other person, "you are..." suggesting that you are offering a universally agreed upon opinion. This will illustrate that the feedback is **your own experience of that person** at that particular time.

5. Be conscious of how you say it.
When giving feedback to a team member, watch your tone and body language. Practice delivering the message in a positive but firm manner, without negative emotion creeping into your words. Feedback which demands change or is imposed heavily on the other person can raise resistance.

How to Receive Feedback

1. Listen to the feedback rather than immediately rejecting or arguing with it.
Feedback can be uncomfortable to hear, but without it, we are working in a void. It is far more beneficial to be on a team when you are aware of the opinions that your team members have of you and their perceptions of your behavior. Therefore, breathe deeply, stay calm and listen carefully.

2. Be clear about what is being said.
Try to avoid jumping to conclusions or becoming defensive. Make sure you understand the feedback before you respond to it. A useful technique can be to paraphrase, or repeat in your own words, the constructive feedback.

3. Check it out with others rather than relying on one source.
To put the feedback in perspective, ask others their opinions of the situation or behaviour being described.

4. Ask for feedback you want and don't get.
As you work to improve your own skills, ask your team for feedback. For example, you may have done some work in an area you identified as a learning goal, such as presenting to large groups, and would like some feedback from your team.

5. Decide what you will do as a result of the feedback you have received.
You can agree and change in the way the team has suggested. You can ask for further clarification. You can disagree and suggest your own perspective. You can ask for differing opinions and ideas. No matter what, you should verbally acknowledge the feedback and thank the giver.

Leading Effectively e-Newsletter
September 2014

Closing the Gap between Intent and Impact

When somebody disappoints you, fails to deliver what you expected or lets you down in some way, what do you do? If you're like most people (leaders are no exception), you make assumptions that are usually not positive and are very often wrong:

> *That guy is not a team player...lazy...doesn't care...just doesn't get it.*

And then you take action:

> *Find a workaround...get somebody else to do the work...rethink responsibilities...tell him off or talk about him to someone else...initiate discipline.*

"We often don't even realize that we create stories about people, especially when they disappoint us," says CCL's coaching portfolio manager Candice Frankovelgia.

"This happens all the time and executives are no exception," she notes. "We assume we know why the other person acted a certain way and react based on those assumptions without checking accuracy."

"Most problems start in the gap between intention and impact," says Frankovelgia.

People usually intend to do the right thing but something gets scrambled or misinterpreted along the way. The impact is far from what they intended. The only way to know what someone intended is to ask — and the only way to let a person know their impact is to tell them.

These important conversations rarely happen, and we move through our days in a tangle of misperceptions and actions based on incorrect assumptions. So, how do you have conversations to find out why a person chose to behave a certain way?

Giving candid, behavioral feedback opens up communication, and CCL's **S**ituation-**B**ehavior-**I**mpact model of feedback has a long history of success. This success is enhanced when the feedback (which is one-way) is accompanied by an inquiry about Intent (two-way). The conversation becomes a clarifying discussion where many difficulties can be avoided.

Sometimes simply asking a question like, "What were you hoping to accomplish?" can open the door to better understanding. For example:

When you wouldn't commit to joining the strategy committee at the end of our staff meeting, I felt like you weren't being a team player and the impact was that I felt you weren't fully engaged. (SBI feedback) What was going on for you? (Inquiry about intent)

Inquiring about intent prevents us from veering off in the wrong direction based on faulty assumptions:

"I didn't commit to joining the strategy committee because I wanted to learn more about the VP's position in order to ensure alignment. I needed time to learn more about the issues. So, actually, I'm more committed and engaged than if I had just agreed due to the pressure of the moment."

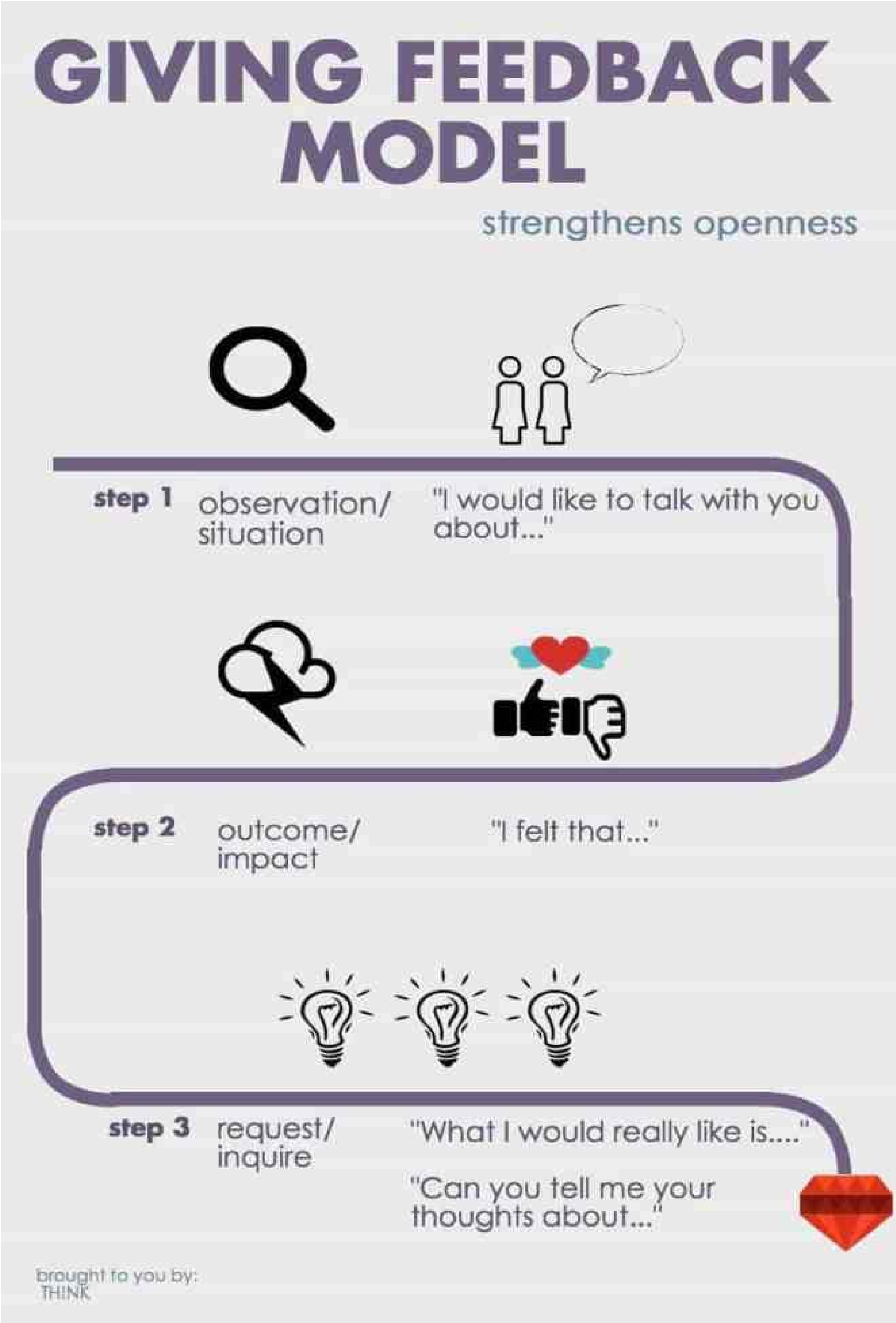
Extending the SBI feedback model to the **SBI-I** allows the conversation to address what's behind a person's actions. This not only clarifies things, but builds trust and understanding. And simple solutions usually follow. Inquiring about intent is also where good coaching starts.

"When you inquire about intention, motivation or what is behind the action, you are essentially in a coaching conversation — one that can make a positive difference well before a performance review or disciplinary conversation," says Frankovelgia. "The ability to have candid, honest and curious conversations is a leadership differentiator, something leaders need to be doing all the time."

It is not that difficult. Check out one of your assumptions now. Go talk to somebody.

The SBI-I model is fundamental to CCL's coaching skills courses: Coaching for Greater Effectiveness and Coaching for Human Resource Professionals.

Giving Feedback Model



Accessed Nov. 21, 2018
http://think-training.com/giving-feedback-model/

Debriefing Assignments

At each stage, the Scribe should record "lessons learned".

The Lead and Second

- The Lead and second were chosen according to interest, equity and availability.
- Leads and Seconds are chosen equitably.

The Assignment Plan

- The Assignment Plan was well-crafted and clear.
- There was a robust discussion around the plan.
- Everyone understood their individual and/or group assignments.
- The timeline was critically reviewed.

The Working Session

Preparation
- The session has been appropriately scheduled in advance.
- The anticipated length of the session was announced at the beginning of the session.
- The members have been clearly advised in advance of the purpose and direction of this session.
- The members have been clearly advised of the individual contributions they were required to bring to this session.
- Agenda had been distributed in advance.

Opening Activities
- A personal check-in occurred before the work got underway.
- The Chair/Lead reviewed the purpose and expected outcomes for the session.
- All members declared their level of preparedness.

Process
- There was a process for tabling the raw material before any work began.
- The Lead led an effective brainstorming process.
- The Lead facilitated consensus on critical issues and decisions.

Debriefing Assignments - Continued

The Working Session

Participation

- There was equitable participation by members.
- Members listened to each other.
- Speakers could completely share their thoughts before others jumped in.
- Listeners drew additional information out of the speaker.
- Thoughts were expressed in an open, frank and transparent manner.
- Disagreements were managed well.
- Members expanded or built upon other member's ideas.
- Everyone attended to the main conversation, no side bar conversations.

Next Steps

- All key decisions were reviewed.
- Action items were reviewed and assigned to certain persons including a clear due date.
- The team left the session with a clear sense of the next steps.

Wrap up

- The agenda was followed.
- The session ended on time or was extended with the team's agreement.
- The session was debriefed.
- Lessons learned were captured by the Scribe, and saved in a location accessible to all team members.

Write the Assignment

80% → 95% → 100%

- The Lead created the 80% draft.
- The Lead and Second worked together. What worked well?
- The team members contributed to the 95% draft as per the Assignment Plan.
- The drafts were on time.
- The Lead was clear on how to submit feedback.
- Feedback was delivered on time.

Final Debrief

- The Scribe records lessons learned and saves for future team reference.
- Discuss how well to team followed their mission, goals and norms.
- Provide Lead with Feedback.

Debriefing Administrative Meetings

At each stage, the Scribe should record “lessons learned”.

Preparation

- The session has been appropriately scheduled in advance.
- The anticipated length of the session was announced at the beginning of the session.
- The members have been clearly advised in advance of the purpose and direction of this session.
- Agenda had been distributed in advance.
- All members declared their level of preparedness.

Meeting Process & Participation

- There was equitable participation by members.
- Members listened to each other.
- Speakers could completely share their thoughts without interruption.
- Listeners drew additional information out of the speaker.
- Thoughts were expressed in an open, frank and transparent manner.
- Disagreements were managed well.
- Members expanded or built upon other member’s ideas.
- Everyone attended to the main conversation, no side bar conversations.
- All key decisions were reviewed.
- Action items were reviewed and assigned to certain persons including a clear due date.
- The team left the session with a clear sense of the next steps.
- The agenda was followed.
- The session ended on time or was extended with the team’s agreement.

Final Debrief

- Team discusses what worked, what didn't work and what to do differently next time.
- Scribe records lessons learned and saves for future team reference.
- Chair provided feedback.

Lessons Learned

This section offers you the opportunity to reflect on some of the skills, knowledge, and insights you acquired during your team administrative meetings, working sessions and monthly team interactions and apply these to future interactions to improve your overall team experience. It will also help you solidify your plans and continue your development journey. Set up a regular agenda item during administrative meetings to review it, add to it and track your progress.

We highly recommend that you share this with your team and your Team Coach. Providing them with insight on where you hope to focus and develop over the coming months will help them support you through ongoing feedback and will also help to keep you accountable to your goals.

Team Administrative Meeting

- What did you learn about yourself during this meeting? What was your role?
- What insights did you gain? How can you apply this to future meetings? On the job? Are there any pitfalls you feel better equipped to avoid or situations you want to address based on your reflection?
- As a team, what was debriefed?
- What do you want to share with your team? With your Team Coach?

Working Session

- What did you learn about yourself during this session? What was your role?
- What insights did you gain? Most Important Points (MIPs).
- How can you apply this to future working sessions? On the job? Are there any pitfalls you feel better equipped to avoid or situations you want to address based on your reflection?
- As a team, what was debriefed?
- What do you want to share with your team? With your Team Coach?

Monthly Team Interactions

- What did you learn about yourself during this session? What was your role?
- What insights did you gain?
- How can you apply this to future working sessions? On the job? Are there any pitfalls you feel better equipped to avoid or situations you want to address based on your reflection?
- As a team, what was debriefed?
- What do you want to share with your team? With your Team Coach?

Team Trouble-shooting Guide

If your team is experiencing difficulties, there are a few quick things to look at. If these don't help, or if you would like some additional information or support, don't hesitate to connect with your Team Performance Coach.

If your team is experiencing:	The problem might be:	What you can do:
Disjointed or ineffective meetings	Poor agendas	Refer to the agenda Best Practices or draw on the experience of team members who have used effective agendas. Prepare and distribute them well in advance of the meeting, and follow them in the meeting
	Weak Chairing	Provide lots of feedback to the Chair about what he or she is doing – what is working, and what could be improved, with concrete suggestions as to how they could make those improvements
	Poorly organized working sessions	The Lead should ensure that he or she has clear goals for the outcomes of the meeting, and that they have been shared with everyone at the start of the meeting
Poor communications	Lack of trust in each other	Ensure that everyone's expectations are clear and understood. Ensure that your norms speak to the issues that you are experiencing, whether it is about coming prepared, or honouring commitments to the team. Raise your hand if someone breaks a norm.
	Lack of skill at surfacing issues or resolving conflict	Create a specific time to get to know each other better and to share with each other your communication style, your stressors and how you react when they are in play, and your concerns. Establish a culture on the team of putting your concerns on the table and asking for feedback on ways you could have done this better. Refer to the Giving and Receiving Feedback Best Practices for other ideas.
	Poor communications	Connect. Pick up the phone, email, text, check in with each other.
An unacceptable level of contribution from one member	Poor assignment plans	Ensure that your assignment plans are concise, precise and that they provide all the information that each team member needs to do his or her job. Deliver these face-to-face (vs. by email), and make sure that everyone understands what they need to do, how it should be done, and any performance standards that are expected.
	A poor performer	As a team, provide concrete, specific feedback on what is expected, what is happening instead, and what the person needs to do to close the gap. If there is not a noticeable change within a short time, contact your Team Performance Coach to discuss options.

If your team is experiencing:	The problem might be:	What you can do:
Unacceptable behaviour from a team member	Poorly written norms or a lack of accountability from the team	Have a team discussion about the norms. Make sure that each norm speaks to behaviours that will matter to the team and it's functioning. Change any that don't work for the team. Use the norms to engage in discussions with individuals who aren't following them. ("We all agreed to…... but you seem to be having trouble doing this, and it is impacting the team in this way….). Be clear on what is expected. If the behaviours persist after an explicit conversation in which everyone participates, contact your Team Performance Coach to discuss options.
	Lack of respect for the team, the norms or the process	Have a team discussion about the norms. Make sure that each norm speaks to behaviours that will matter to the team and it's functioning. Change any that don't work for the team. Use the norms to engage in discussions with individuals who aren't following them. ("We all agreed to…... but you seem to be having trouble doing this, and it is impacting the team in this way….). Be clear on what is expected. If the behaviours persist after an explicit conversation in which everyone participates, contact your Team Performance Coach to discuss options.
A lot of stress related to completion of team assignments	Poorly written assignment plans	See above
	Lack of understanding of the roles	Refer to the Best Practices on the Roles of Leads and Seconds to clarify. Discuss among the team members until there is a shared understanding.
	A poor performer	See above
	Timelines that don't work well for the team	The Lead should refer to the team calendar when deriving the timeline to ensure that all the moving parts work together. If you don't have a team calendar, consider creating one. Make sure that everyone reviews the timeline when the Assignment Plan is shared initially, and that everyone has shared any concerns, or constraints. Consider having your submission date a little before the actual submission deadline to allow some contingency.

Chapter 5

Peer Review

The Power of Peer Review

Your team journey here at Smith School of Business is about learning to build, manage and lead teams. Your journey also provides you with a unique opportunity to enhance your skills when leading and working with a team. These skills will not only help you now but will be critical to your success as you progress to the next phase of your career.

One of the qualities of a truly high performing team is that each team member is committed to the growth and development of both the team and individual team members. Members of high performing teams inspire each other to be their best.

The Peer Review is a web-based assessment that provides you with an opportunity to give feedback to your teammates. The assessment is done online and is confidential. You will be asked to assess yourself and your teammates against twenty of the most critical team member behaviours. In addition to these twenty elements, you will also be asked to comment on your teammates' strengths and potential areas for improvement.

The Peer Review Questions

Using the Peer Review web-based assessment tool you will assess yourself and each team member on the following statements. Your assessment will use a frequency scale, 1 being rarely/hardly ever – 5 being frequently/if not always. It is helpful to include a written comment in the textbox provided for each question in order to clarify/provide an example that demonstrates the frequency assigned. Remember that what you type is exactly what your teammates will receive. So prepare in advance, think about not only what you want to say but also how you want to say it.

	Q#	Questions
Team Player & Team Values	1	Interacts with teammates in a culturally sensitive manner.
	2	Makes team and teamwork a priority.
	3	Willing to accept feedback and adjust behaviour for the benefit of the team.
	4	Treats every team member with respect and as an equal.
	5	Acts in a manner that reflects favorably on the team.
	6	Can be trusted and relied upon to do what he/she says he/she will do.
Contribution & Added Value to Team Functioning	7	Adds value to team discussions.
	8	Upholds the team's norms in a way that directly contributes to team performance.
	9	Follows the course of action decided by the team once consensus has been reached.
	10	Fulfills the roles and responsibilities of a Lead effectively.
	11	Provides high quality inputs to projects and assignments.
Supportive Communication	12	Discusses or debates to solve the problem rather than just to be right.
	13	Follows team processes for raising issues on the team.
	14	Communicates in a supportive and constructive way.
	15	Actively listens to the thoughts and opinions of other team members.
	16	Communicates with others in an honest and transparent fashion, no hidden agendas or motives.
Team Leadership	17	Identifies lessons learned through debriefing.
	18	Provides positive reinforcement and encouragement to team members.
	19	Provides constructive feedback to others.
	20	Creates an atmosphere that motivates the team to be its best.

Peer Review Evaluation Reflections

Consider the feedback from your Peer Review and categorize it in the following table:

Expected Positive Feedback	Unexpected Positive Feedback
* * * <u>Action Items</u> Congratulate yourself! How can you make use of this skill to enhance productivity?	* * * <u>Action Items</u> Celebrate and share this newly discovered skill. How can you make use of this skill?
Expected Constructive/Developmental Feedback	**Unexpected Constructive/Developmental Feedback**
* * * <u>Action Items</u> What can you do to overcome this observation? Consider the consequences if you were NOT to make the changes.	* * * <u>Action Items</u> Do you need more information to help understand the feedback? Is there any form of support that you may need to deal with the feedback? Plan action steps to adjust behaviour. Consider the consequences if you were to make the changes.

Stop – Start – Continue Exercise

STOP

"What should we/I ***stop doing****?"*

List ideas/items:

- Things that are not working or helping
- Things that impede or are not practical
- Not delivering desired results
- We or others dislike

START

"What should we/I ***start doing****?"*

List ideas/items:

- Things that are not being done, but should be done
- Things to begin doing to get better results
- Things worth trying or experimenting for better results

CONTINUE

"What should we/I ***continue doing****?"*

List ideas/items:

- Things that are working well
- Things that we want to keep
- Worth continuing to see if they're worthwhile
- We like or need

Chapter 6

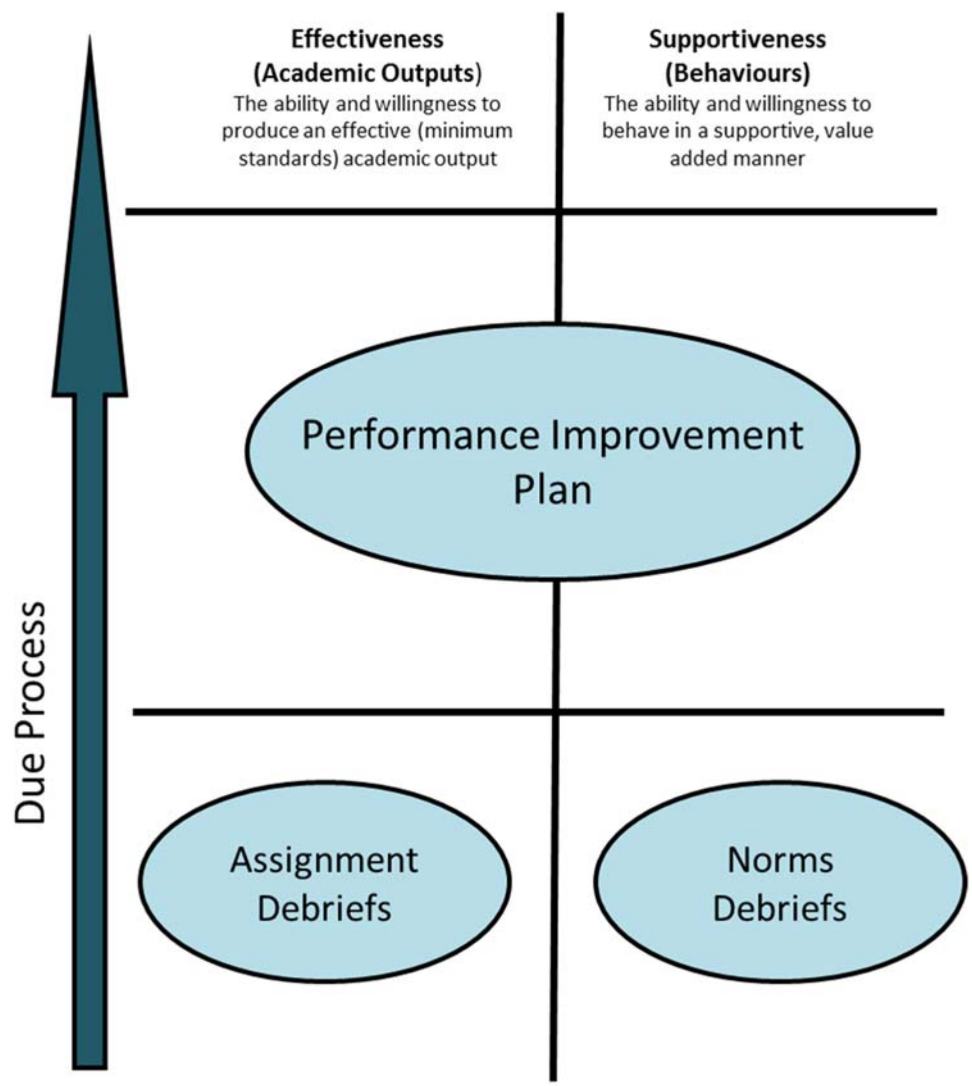
Performance Management

Team Process for Managing Performance

While in the program, participants develop many valuable team skills, specifically regarding performance, participants learn to participate in the self-management of the team, and to collectively manage the performance of any one of the members.

Team members can help each other develop the “supportive” and “effective” behaviours that are required to be successful in the program. They do this by communicating thoroughly and appropriately using the norms of the team, the debriefing process and frequent, timely, specific feedback. If an individual is unable or not willing to align with the expected behaviours, they will have a chance to develop the necessary skills through a Performance Improvement Plan that is overseen by the team in concert with the Team Performance Coach.

The graphic below illustrates our recommended performance management model.



Performance Improvement Plan Overview

Purpose: To provide an overview of the Performance Improvement Plan (PIP), explaining briefly what it is, why and when it is used, and to outline the roles and responsibilities of the various members of the team during the PIP period.

Team learning is a very large part of the curriculum and the experience of students engaged in MBA and Master's programs at Smith School of Business. The learning is supported by a long history of experience at the School, and by a team of experienced coaches who are trained to assist the teams.

Each member of every team is required to engage fully with the program and to contribute academically throughout the program. They do this by being supportive of the other members of the team, demonstrated through the common business practices and their adherence to the elements of the team contract that the team collectively creates. They also do this by being effective, demonstrated through their consistent effort and academic contribution at a Master's level and in concert with the expectations defined by the team. A team member who consistently fails to demonstrate their ability to be supportive and effective can be asked to leave the program.

At times individuals might not be behaving or contributing at a level that meets the needs and expectations of the team. When this happens, a team can initiate a performance management process, which is available to support the development and success of the team. This process is designed to allow a team to help their teammate be successful.

The Performance Improvement Plan is a formal process that is available to help teams to assess team members who are not meeting the stated expectations of the team and to ensure that they are carrying out their responsibilities. It is a facilitated process and is guided by the Team Performance Coach.

The ultimate goal is to provide a framework in which a team member who is struggling with being effective or supportive can be given the opportunity to clearly understand the expectations, and then demonstrate through action their ability to achieve them.

A PIP is established to address issues raised by the team related to lack of supportiveness, lack of effectiveness or both.

During a PIP, the individual on the PIP is challenged to do what they can to understand what is being asked of them, and then to demonstrate their ability to meet the expectations of the team. They are encouraged to use the supporting resources, such as their Team Coach and an executive coach, and to seek feedback from teammates to assess their progress.

The responsibility of the other team members during a PIP is to carry on, "business as usual", assisting their teammate as much as they would any other teammate. They should provide feedback to the individual as they would any other, and when they are asked for it. They need to provide feedback in a clear and helpful way so that the individual on the PIP can learn from it and have the opportunity to make change.

Chapter 7

Reflections

The Power of Reflection

Reflection is taking the time to think about what you have experienced. This time spent thinking, analyzing, interpreting, turns your experiences into meaningful learning.

Reflecting on your experiences as they relate to your individual goals and the Team's mission, goals and norms adds perspective and focus.

The following questions are designed to help you reflect as a team so that you can identify what you have done to achieve your current level of team performance. Ultimately this will enable the transfer of meaningful learning beyond the academic experience.

Final Reflections Exercise

1. What has your key learning been from the team perspective?

2. To enhance your learning, and to take advantage of what others have learned, share your thoughts on how you have or will take your key learning back to the workplace. Consider what has worked (or has a good chance of working), and what hasn't / (or might not), and why.

3. Describe the culture of your team. Discounting the luck of the draw in the make-up of your team, try to identify what you did as individuals and as a team to create and sustain the culture of your team.

4. What behaviours did you engage in? What things did you actively ensure that you never did and/or always did?

5. How did you build trust? What activities did you undertake as individuals and a team to ensure that trust was built and maintained throughout the program?

6. What were the key elements of communication that came into play – at meetings, between meetings? How did you manage conflict? Did you engage in healthy debate? What roles were important in managing communication/conflict/debate?

7. How did you manage personal and team accountability? Were you able to confront each other in a productive manner? If so, what allowed you to do that? If not, what got in the way? Could everyone do this? How does this relate to your workplace?

8. How did you manage the pursuit of results? Where did the teamwork fit into the schedule in relation to personal academic pursuits, work, and life? Was there alignment on goals for marks and/or learning from team endeavours?

Notes Page

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