

Team Playbook for Busy Leaders

9 practical tools to help you do more with less, for leaders who just can't afford to slow down.

Do More with Less.

This is the number one directive all of our clients have in common. No matter where you work, across every industry leaders are busier than they've ever been. Hiring costs have trebled, and resources are constrained in every area imaginable—time, talent, budget, mental health, social capital.

And yet contrary to what most assume, an oversized workload is usually not the root cause of lagging team performance. Yes, work life balance is still important. No, we don't recommend overloading your people on a regular basis. But research and our own experience shows that the success of teams has less to do with the amount of work everyone has, and more to do with the alignment of a few key elements:



Organizational Strategy

Every team is part of a broader organization. Your context isn't something you can directly control, but you should be aware of how the broader environment impacts your team. Your strategy informs why your team exists and how your team executes on mission-critical work. And it goes both ways. For your team to succeed, the broader organization has to support and work with your team as needed.

Role-to-Strength Fit

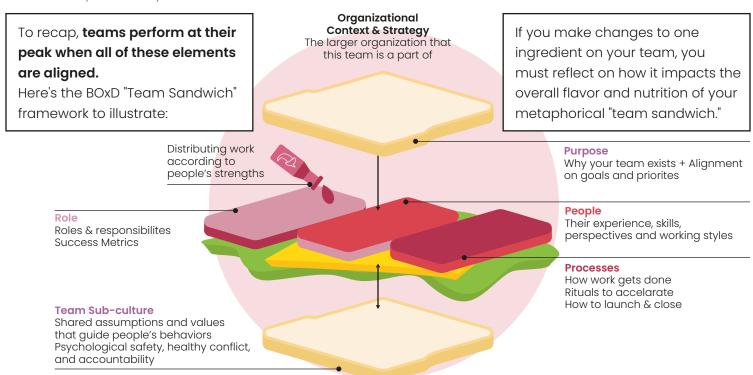
We know that when people work on things that they're good at **and** that energize them, their performance and engagement increase dramatically. If you distribute work across the team according to people's strengths, you'll find your team's secret sauce.

Clarity of Purpose

We know that healthy, high performing teams are clear about why their team exists, and aligned on mission-critical goals and priorities. Your team's purpose determines the roles you need on the team- how many of those roles, what they do, and how success is defined. Clarity of purpose also allows you to get clear on who should be part of the team and which processes people engage in to get work done.

Team Subculture

Your team culture and the dyadic relationships within form the foundation of your people's experience. To your people, their manager and their team is their world. Behavioral and decision-making norms, the cadence and structure of meetings, the tone of your emails and chats... the hundred little tics and artifacts make up the core of who and how you are together. Your sub-culture is unique in that it is both a **product and a driver** of your team.



Great teams are not a happy accident. Whether they are senior leadership teams or frontliners, full-time or special project teams, co-located or distributed, BOXD offers this framework as a starting point to help leaders design better teams to unleash the unique power of its membership.

Hold up. Didn't you say this was a practical guide for busy leaders who are short on time? I don't have time to perform a full team assessment and build a custom solution for my already very-burnt-out team members.

We hear you. Rather than reinvent the wheel, at BOXD we know how important it is to honor what is already working for your team. Our clients are no dummies – they're experts at the top of their field who have made it pretty far without consultants. WE know that YOU know your people, your problems, and your mission better than anyone.

That's why we put together a list of the most common team challenges accompanied by quick guides for addressing those specific pain points.

Keep these in your back pocket so that you can take on rainy days without missing a beat.

Form a New Team Add a New Manager

Psychological Safety Checklist

Team Charter Template

How-To Manuals

Resolve Conflict Uncover Root Causes of Dysfunction

Team Values Refresh

Stop, Start, Continue

Guide to Healthy Disagreement

Get Unstuck Make Progress on a Strategic Decision

Clarify Roles

Decision Making Redux

Value / Feasibility Matrix

Click on the links!

What is Psychological Safety?

Psychological safety is the shared belief that team members will be supported to take interpersonal risks, knowing that showing their full selves will not yield negative consequences.

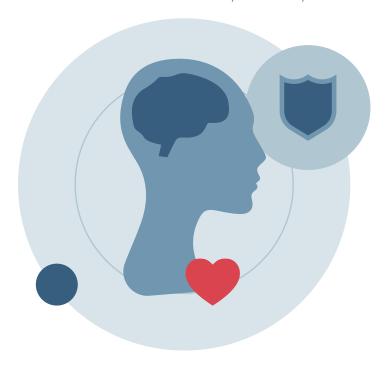
What does psychological safety look like in practice?

- · High levels of trust between team members
- · Comfort raising differing opinions or ideas
- Willingness to admit mistakes without fearing negative repercussions
- · Ensuring all voices are heard
- Not feeling the need to excessively filter who you are at work

Where does psychological safety start?

With you, the team leader. Your job is to build the foundations of a healthy team climate by consistently role modeling and reinforcing positive behaviors. Simple-but not easy.

Whether you're standing up a new team or resetting your current team, it is worth your time to ensure you have all the ingredients to provide an environment where people on your team feel safe enough to ask questions, engage in healthy conflict, and put forth new ideas. This is not about coddling your team with warm fuzzies. When your team members can engage in task-oriented conflict without excessive personalizing, defensiveness, hole-poking or stonewalling-this is the competitive advantage that will fuel your team's creativity and propel your organization to success.



Why is psychological safety important to team success?

Because when people feel scared or embarrassed, there can be no learning. And when there is no learning, there is no path to improvement. When people are afraid to challenge the status quo, there can be no innovation. Simply put, teams with higher levels of psychological safety are faster at helping their organizations win in their market.

Where do I start?

With a checklist, of course! Here are some concrete behaviors that leaders can start demonstrating tomorrow to foster a psychologically safe environment.

Psychological Safety Checklist:

Be Curious by Default

- □ Ask questions to learn, not to instruct. This means leaving rhetorical questions and devil's advocacy at the door. Approach the unknown like a scientist collecting data, not a lawyer collecting evidence for a case.
- ☐ Get in the habit of using the phrase "Tell me more" so that your team doesn't have to wonder if every conversation will turn into an interrogation.
- □ Solicit feedback and opinions frequently so that your team knows you value their input. Invite your people to challenge your ideas and push back on your assumptions.
- When probing for more details, share context about why you're asking. When your people don't have to guess at the intention behind your question, it leads to less talking in circles and allows for faster information sharing.
- Sense or solicit feelings from others on a regular basis.

Be Present and Focused

- Be aware of how your body language and facial expressions can affect interpersonal situations. Do you frown when you're confused? Do you grimace when someone suggests an idea you disagree with? Do you nod in agreement? Ask for feedback about your body language if you're unsure.
- □ Validate and acknowledge input whenever possible. "That makes sense to me. / You raise an interesting point."
- □ Express gratitude as often as you can, across every medium. Be specific and make it personal so that your team members feel seen and valued.
- Be available to your team. Don't cancel 1-1s with your direct reports just because you can. Reschedule immediately if you have to. Encourage people to book time on your calendar for coaching and feedback..

Proactively Include

- ☐ Be assertive when someone speaks negatively about another team member.
 - Avoid interrupting, and speak up when someone else interrupts to make sure all ideas are voiced.
- Build rapport and show interest in your people's lives and interests outside of work. Don't insist on self-disclosure from others, but consistently encourage others to share openly if they are comfortable.
- ☐ Link ideas or suggestions back to what has already been shared, and give credit if you know an idea was shared by someone who is not speaking up for themselves, or who is outside the meeting.
- Be explicit about inviting participation in multiple ways (anonymous, poll, chat, 1-1 meeting)

Model Vulnerability

- ☐ Share information about your personal work style, schedule and communication preferences so that others will feel comfortable to do the same.
- ☐ Add humor and perspective when appropriate.
- Be open about your own mistakes, feelings or blind spots, so that others feel safe to fail, share unique information, and admit when they need help.
- ☐ Role model setting boundaries and prioritizing well-being so that others have an example to follow.

Team Charter

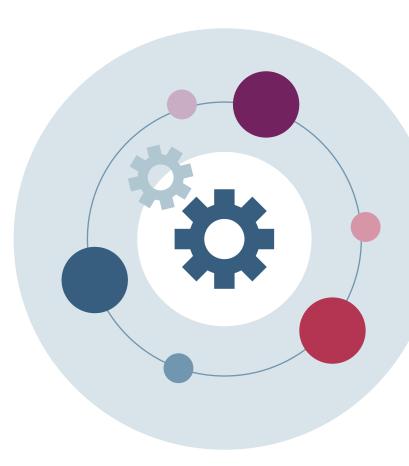
When to use this tool:

If you're standing up a new project team, adding a significant amount of new members, or changing team leads.

How to use this tool:

Carve out time for a 60-90 minute structured dialogue around team norms at least 2x annually to ensure there is a flexible framework for inclusive meeting and decision making practices.

Develop your charter together using a whiteboard tool like Jamboard, Mural, or even PPT online. Store your charter as a living document in a central location where everyone can access and make suggestions on a rolling basis. Share the charter with new team members so they know what to expect, and ask for their suggestions to add or edit the charter after their first month with the team. This is a great way to keep your charter active, relevant and sustainable.



Team Charter Template:

Members Who's on this team? How do we get in touch with them?	
Mission What are we trying to do?	
Values What do you care about? What's important to you?	
Norms What are the behaviors we want to see and demonstrate? How do we make decisions?	Behaviors Decision-making methods
Roles What are the roles we need to get work done? Who does what?	
Metrics How will we know when we've been successful? What do we measure? How often?	

Individual "User Manual"

When to use it:

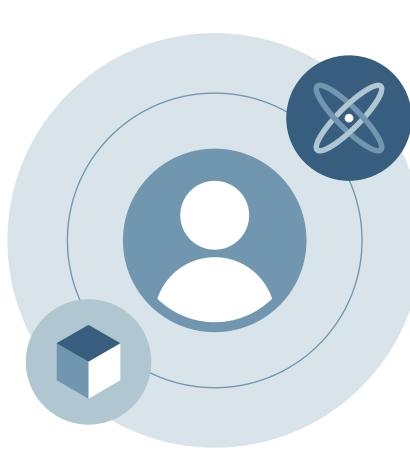
When standing up a new team or adding a new team member.

How to use it:

Each team member fills out their guide, and all guides are shared in a central location where team members can view each others' documents.

Estimated time to complete:

15-20 minutes



How I Work

A user manual for: _

(Check the one that most resonates.)

How to unlock my full potential?

What I Value

How to best communicate with me

What people misunderstand about me

How to help me be more effective

What I don't have patience for

Anything else you want others to know?

Team Values

What do we care about?

In this facilitated session, team members will gather (in person or virtually) to define and identify shared core values. They will then translate those values into behaviors that exemplify the values.

When to use:

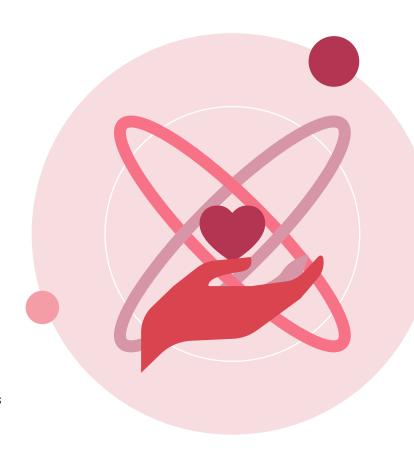
Before or during a new team's charter development, or when dysfunctional behaviors have negatively affected team performance.

Objectives:

- Define and align on core values to guide the team's work and decision-making.
- Identify the behaviors that will allow team members to exemplify their shared values.
- Strengthen and deepen team members' connections to one another

Estimated time to complete:

90 minutes



Agenda:

Final Agreement on Values and Behaviors 20 minutes	Gain consensus on the final list: Poll the group on each value. On a scale of 1-5, how committed am I to this value? 5 = full commitment 1 = indicates no commitment.
Values→Behaviors 20 minutes	2 teams brainstorm behaviors and descriptions in breakout rooms. Prompt for brainstorming: What behaviors or actions do we expect to see? What does [value example: honesty] look like? Additionally, what behaviors could undermine our values? If [ex. 'collaboration'] is one of the top values, what does that actually mean in practice? Small groups present descriptions and behaviors. Invite input and amend as needed.
	Break 5-10 minutes
Develop Core Team Values 40-45 minutes	Share highlights in small groups: Pairs team up with other pairs (groups of 4) to share key highlights and align on 3-4 values they all value. Group discussion: Small groups return to the main group to report back on the shortlist of values they came up with. Values are clustered in themes using a shared whiteboard tool. The group votes for their top 3 values (put a dot next to your top 3) so that a list of 3-5 values will emerge as the final list.
Davidan Gara	Breakout discussion (pairs): Participants have 10 minutes to interview each other using the following prompts: Talk about a time when you were on a team that was working really well together (whether at this company or in a previous one). How did it feel to be on that team? What conditions helped you do your best work? What did you value about theexperience?
Introduction 5-10 minutes	these values. At the end of this meeting, we'll walk away with a list of 3-5 core values we share as a team, and a list of the behaviors that describe what each value looks like.) Company values: Review any existing company values together, and solicit examples of behaviors that demonstrate the values.
Introduction	Share an overview of the session, and explain why you're doing this. (When we agree on what we value, this directly informs what work we prioritize, how we work together, and how we make decisions as a group. During this meeting we'll define what we value about being part of a team, and what behaviors or actions exemplify

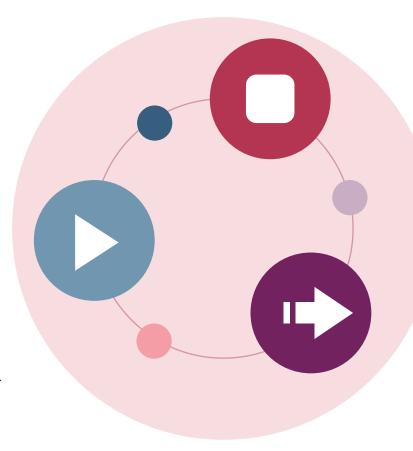
Stop, Start, Continue

Purpose:

Reflect on how team behaviors impact team performance. Collectively and consciously commit to which behaviors you will engage in going forward

Behavior change is hard work. It takes time. It takes discipline, practice, and shared accountability. Some guidelines as you begin your team effectiveness journey:

- Be comfortable with non-closure.
- Have compassion for your teammates.
- · Remain curious and open.
- Approach new behaviors like a scientist, not a lawyer
 you're testing a hypothesis to see what new results
 you can get, not collecting evidence for your defense.
- Respectfully refer back to these inclusive principles when you feel a team member is demonstrating unhelpful behaviors.
- Practice, practice that's how behaviors become habits.
- Praise and encourage those who demonstrate inclusive behaviors. Positive psychology is powerful!



Facilitator guide:

Identify a typical gathering (monthly meeting, annual offsite) where you would like to observe team dynamics.

2

Nominate someone to be the "Team Observer." You can do this with more than one observer at a time, or run through the observation a few times, rotating observers. This person can use the list of Inclusive and Non-Inclusive behaviors as a starting "rubric" to count the number of times these behaviors occur during the team gathering.

3

During the team gathering, the Team Observer(s) note the number of times each behavior occurs during the meeting. No need to say who did what -- this is not about singling out individual team members, but rather to tally how many occurrences there are of each behavior total.

4

The Team Observer(s) share back results with the team.

5

The team engages in discussion on the implication of the results of the observation.

The goal is not to have "perfect" answers, but rather to engage in meaningful reflection as a team. Some prompts for consideration:

- A. Which behaviors did we engage in the most, as a group?
- B. Which behaviors did we engage in the least, as a group?
- C. What does this say about us as a team?
- D. What, if anything, surprised us about our results?
- E. What was the experience like to observe?
- F. What was the experience like to be observed?
- G. What might this tell us about ourselves?

6

Using a virtual collaboration tool (MURAL, Jamboard, Padlet or even PPT online), make 3 columns called "STOP, START, CONTINUE."

Team will brainstorm behaviors for each column. Remind team that these should only include actions or behaviors, not personality traits, characteristics or attitudes. Be specific— "stop interrupting people" rather than "stop being rude."

Stop: unhelpful behaviors noticed during the meeting which team members would like to stop

Start: inclusive behaviors not observed during the meeting which would be helpful to begin incorporating into team dynamics

Continue: helpful, inclusive behaviors which contributed value to the meeting and should be continued

7

Cluster suggestions into themes. Discuss themes as a group. What stands out?

8

Vote for top behaviors to stop, start and continue. Each person gets 3 votes total. They can use all 3 votes on a single behavior, or spread their votes out across multiple behaviors.

9

Pick the top 3 behaviors to work on.

If all 3 behaviors come from 1 column, that's OK!

This is an important insight for your team about where progress can be made.

10

Decide:

A. When you want to start working on this.

The next team meeting?

- B. Who will champion this? Owners?
- C. How will we measure progress?
- D. When will we reflect again as a team?

Team Leader's Guide to Healthy Disagreement

Without disagreement, there can be no improvement. We all have blind spots, and nobody has all the answers. That's why the best teams know how to generate and engage in positive conflict. These are the teams that learn fast, innovate faster, and make the best decisions together.

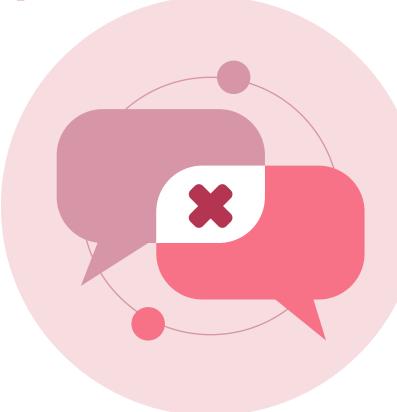
This facilitation guide is designed to help teams identify and articulate the secret sauce of their group communication norms and ground rules that will enable everyone to embrace healthy conflict and disagree respectfully.

Outcomes:

- Align on a set of behavioral norms the team can commit and refer back to.
- Create a supportive space for individuals to share details about how they interact, especially during conflict.
- Strengthen team member relationships and normalize productive conflict.

Estimated time to complete:

60 minutes



Facilitator guide:

Review the concept of psychological safety, and explain why it is an important foundation of team success. Explain that this meeting is designed to enhance psychological safety.

Put the following prompts on two slides and ask participants to take 2-3 minutes to write down responses to each slide:

Slide 1:

Think of a team you were on (here or somewhere else) where you felt free to speak up and ask for help.

- 1. What did it feel like to be part of that team?
- 2. What kind of behaviors did you see?
- 3. What was the impact?

Slide 2:

Now think of a team you were on where it didn't feel that safe to speak up or ask for help.

- 1. What did that feel like?
- 2. What kinds of behaviors did you see?
- 3. What was the impact?

3

Break into small groups (3-4 people) for 10 minutes to discuss individual responses and highlight "safe" and "unsafe" behaviors.

4

Return groups to the main room, and invite groups to report out shared themes and key discoveries about what it's like to be on a "safe" team, and what it's like to be on an "unsafe" team. Ask people to drop comments in the chat as well.

5

Poll: Could this team do a better job of addressing and resolving conflict? (Yes / No / Not Sure). Ask if any volunteers are willing to talk about how they responded to the poll.

Pairs interview each other in breakout rooms (5 minutes) with the following questions:

6

- Tell me about a time when your team was engaged in productive conflict. What made the conflict healthy? What conditions were present to support the productivity of the conflict?
- Tell me about a time when your team was engaged in unproductive conflict. What made the conflict unproductive? What conditions were present to support healthy conflict?

Using a virtual whiteboard tool, ask participants to take 5-10 minutes to independently brainstorm as many ideas (one idea per sticky note) for the following:

- Behaviors or communication norms that prevent unproductive conflict
- Conditions that promote safe disagreement

8

Small groups (3-4) break out in rooms for 10 minutes to identify common themes from the independent brainstorm session.

Bring the group back for a team discussion, using the following as suggested prompts:

- "Where do folks see the opportunity to have a new behavioral or communication norm?"
- "What does each norm look like in action?
 What are the observable behaviors?
 For example, what does "all voices should be heard" actually look like in practice?" Be specific and encourage storytelling and examples.
 The goal is for everyone to understand and agree on what the norm actually looks like.
- "Of the norms we identified, are there 1 or 2 we can commit to implementing?" If there are no clear frontrunners, you can ask everyone to vote on their top 3 norms with a dot.
- "How might we hold each other accountable?"
- "How will we put this into action so that it's more than just a spirited conversation? Would anyone be willing to champion or sponsor a norm?"
- How will we know if we've been successful?
 When do we want to meet again to reflect on our progress? (Schedule that meeting as soon as you can!).

10

Document the final list of norms and file in a shared location where everyone can access, refer back to, and comment on the team norms.

Thank everyone for participating and choosing to invest their time in their team.

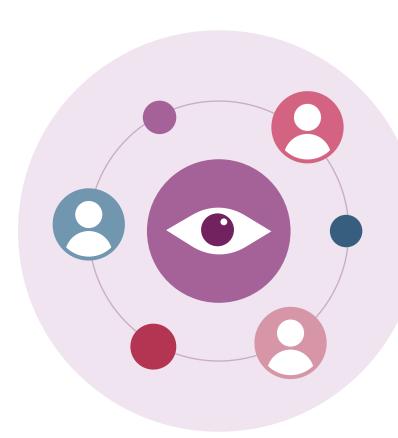
Role Clarification For Teams

Role ambiguity within teams is one of the biggest drains on productivity and morale. When the scope and boundaries of work are unclear, team members are likely to feel overwhelmed, overworked, and poised to turn on new job alerts from LinkedIn. Understanding and aligning team roles can make a Sisyphean mountain of work feel more like an energizing hike up a hill. Tough, but doable.

This team exercise is designed to help members clarify the roles and responsibilities of all teammates, and clearly articulate what they need from others to be effective.

Pro tip:

For less dependable teams, more clarification will accelerate team performance and increase engagement. On the flip side, highly dependable teams may find too much clarification to be stifling. Reflect on what kind of team yours is to determine how much clarification is actually needed. We encourage you to adapt and cherry pick the most useful elements according to what your specific team needs are.



Overview:

Brainstorm a list of roles to be clarified/discussed. Create a comprehensive list of roles/titles to be discussed and defined by the team

2

Have the appropriate team member present/discuss the history of each role and how people have been selected for the role in the past.

3

Discuss the current state of each role, including perceptions and examples of what the individual roles are. During discussion, record where role confusion exists including examples of "blurring" of responsibilities that have occurred with the team or organization.

Use real life experiences to demonstrate how role confusion is impacting the team.

4

After this discussion, use the list developed in step one to draft a list of brainstormed responsibilities/tasks for each role.

This can be done by group discussion or an activity where flip charts are hung around the room with individual roles listed and participants can walk the room and list role descriptions on each chart.

5

Review each specific role and the brainstormed list and work to come to agreement/consensus as per the specific responsibility for each role. The team may also want to draft a list of competencies or operational statements for the role. If agreement on responsibilities cannot be reached, develop related steps for achieving clarity (seek input from sponsors, executives, or staff in those roles who are not currently in the room). Ultimately, the goal of this step is to cull the brainstormed list of responsibilities into an agreed upon list of tasks/responsibilities that each role is accountable for.

6

Use the below role clarity template to further enhance role descriptions and drill deeper into behaviors and expected outputs of the role.

7

Use this newly developed set of roles and responsibilities as the "defined desired future state". You are now positioned to assess current performance as per the agreed upon roles and responsibilities. Identify strengths and gaps in relation to performance of staff relative to roles specifically, recording operationally the gaps.

8

Prioritize gaps and identify root causes and general remedies. If the remedy requires further clarification of the roles and responsibilities or communication of the new definitions to those outside of the meeting, use the work that has already been completed by the group as the basis for that work.

9

Identify quick wins or mid or long term continuous improvement planning steps based on conversation and related to root causes for the role confusion to make the positive impact of the role clarity sustainable.

10

Consider related communications to sponsors, staff, or stakeholders.

Role Template

Formats for documenting role clarification vary, but there are some useful guidelines for what to include in an effective role definition:

- How the role supports the strategy (purpose or the role)
- Key responsibilities
- Key task
- Outputs and outcomes of the role (how success will be measured)
- · Values/behaviors
- Knowledge, skills and abilities

Department/Unit/Individual:
Have Department/Unit/Individual fill in the following information:
Department/Unit/Individual overall purpose (connects strategy/mission/values):
Department/Unit/Individual key responsibilities:
Department/Unit/Individual key tasks:
What are our outputs and outcomes - how we can measure our success:
What Values/Behaviors are needed to perform effectively:
What Knowledge, Skills, Abilities are needed to perform effectively:

Team Decision Making

What's at stake when we talk about making better decisions? Whatever happened to failing fast and learning from mistakes?

Although it's crucial for leaders to know how to gracefully tolerate failure, making good decisions is still directly proportional to your organization's speed of growth and success. You don't have unlimited resources or goodwill from your people. Normalizing suboptimal decision-making can have disastrous consequences for teams operating in thin margins with scarce resources.

Key factors to consider when choosing the best decision making method are:

- 1. Can we easily identify primary owners of decisions and outcomes?
- 2. How important is the issue to the team? To the organization?
- 3. How much time do we have to make the decision?
- 4. What's at stake if we don't make a decision quickly?
- 5. How qualified are our team members to make the decision?
 - (Think: expertise, skills, knowledge, experience)
- 6. Does the group have a history of making decisions collaboratively?
- 7. How much buy-in do we need for successful implementation?
- 8. Are there any development opportunities if we delegate a decision?



Although consensus is a highly aspirational and prized decision making method in today's workplace, not all organizations are designed to accommodate this as a primary method. Consensus is time consuming and requires specific cultural and behavioral norms to drive it.

But it is still the best method when you want to get maximum buy-in. Here are some useful alternatives to provide your team so that you can get closer to consensus without spending hours in meetings that go nowhere:

- 1. I will block this decision.
- 2. I don't like the decision, but I will not block it.
- 3. I can live with the decision.
- 4. This decision is our best option.
- 5. I will enthusiastically support this decision.

Team Decision Making	BOxD	Team Play	ybook for B	usy L	eade

Depending on the communication and meeting norms on your team, you may seek levels of consensus in a poll, or ask each individual what their level of consent is a decision.

Note: Consent doesn't mean you agree with every part of a decision. At a minimum, it means that you agree to support the decision with words and actions. If you are not willing to commit to a decision in good faith, then you should speak up early and withhold your consent for support (no higher than level 2). It's best to share concerns and seek clarity as early as possible to avoid an escalation of sunk cost. If there are too many 2s or below (even after more discussion), it's time to deploy a back-up decision making method.

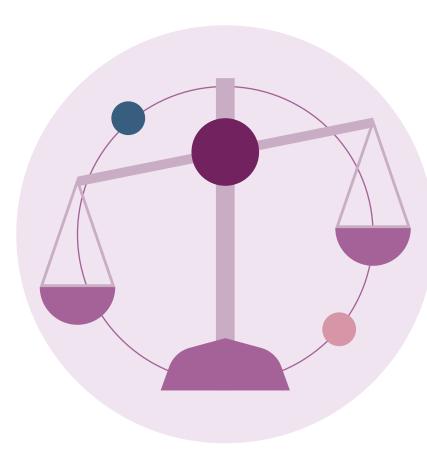
Here is a chart of different decision making methods. If you find yourself frequently stuck on decision making within your team, it's worth it to run through a 30-minute exercise and fill this template out with your team. This shared reference becomes a powerful accountability tool down the road.

	Pros and cons of this method	Our team should use this method when
Decide and announce the decision, without involving others.	Pro: Con:	
Consult Solicit input from others and then decide.	Pro: Con:	
Vote Review options, then hold a majority vote	Pro: Con:	
Consensus Discuss as a group until everyone is aligned on a single decision.	Pro: Con:	
Delegate Ask someone else to make the decision.	Pro: Con:	

Value / Feasibility Matrix

Making big decisions quickly is a mainstay for today's leaders. Most people have a hard time rapidly establishing priorities on their own without some sort of structure or visual aid. And adding more people to the decision making process is an important way to make high quality, strategic decisions – but it takes even more time to tease out priorities and align on a way forward.

The simplicity of this 2x2 "Value / Feasibility" matrix will enable your team to sift through competing criteria and make better decisions together, faster. If you're struggling to make progress on a big team decision, use the template during your next meeting to get unstuck.



Value/Feasibility Matrix

First, plot items vertically by relative value. Force rankings; don't allow two ideas to occupy the same coordinates.

2

Then, plot the items horizontally by relative difficulty. You should have a nice scatterplot of sticky notes by now, and you can divide them into four quadrants:

easiblity

The Y axis represents feasibility – how difficult is it to implement, or how much will it cost to execute?

Luxurious

The upper left quadrant is **luxurious**.

These things are nice to have, but they are costly endeavors with not much return on investment.



Strategic

The items in the upper right quadrant are **strategic**.
They cost a lot, but the payoff is huge.





Targeted

The items that end up in the lower left quadrant are **targeted**. They are the easiest to realize, but they don't have much value so are not an immediate priority.



The lower right quadrant has your **no brainers**, or low hanging fruit. These ideas are high value because they have tremendous value with a low price tag.



The X axis represents the overall value – how much impact and relative market potential does this have?

Value



Team Playbook for Busy Leaders

9 practical tools to help you do more with less, for leaders who just can't afford to slow down.

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