

DEPARTMENT OF THE AIR FORCE
Thomas N. Barnes Center for Enlisted Education (AETC)
Maxwell AFB, AL 36118

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AIRMAN LEADERSHIP SCHOOL
STUDENT GUIDE

PART I
COVER SHEET

LESSON TITLE: SA03, TEAM LEADER
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TIME: 3 Hours

METHOD: Guided Discussion/Experiential

REFERENCES:

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- Gibbs, Joe. *Racing to Win*. Sisters, Oregon: Multnomah Publishers, 2002, 141.
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Streibel, B. J., P. R. Scholtes, and B. L. Joiner, *The Team Handbook*, 2nd ed., Madison, WI: Oriel Incorporated, 1996.

STUDENT PREPARATION: Complete the reading assignment in the student guide prior to class (7,765 words, approximate time: 55 minutes). Additionally, complete and print out the Electronic Team Members Preferred Role Estimator Assessment (e-TMPRE). Bring your e-TMPRE assessment to class and be prepared to answer questions on lesson principles.

PART IA

GENERAL LEARNING OUTCOME: Students who graduate from Airman Leadership School will possess an improved knowledge and understanding of teams, team dynamics, and what it means to be an effective team leader and follower.

SUPPORTED COMPETENCIES/DIRECTIVES:

The *Team Leader* lesson supports the following Air Force Institutional Competencies:

- Leading People : Develops and Inspires Others
- Embodies AF Culture : Followership
- Fostering Collaborative Relationships : Builds Team and Coalitions
- Strategic Thinking : Vision

TERMINAL COGNITIVE OBJECTIVE: Comprehend Team Leader concepts and their impact on NCO, unit, and mission effectiveness.

TERMINAL COGNITIVE SAMPLES OF BEHAVIOR:

1. Explain Team Leader concepts and their impact on NCO, unit, and mission effectiveness.
2. Give examples of Team Leader concepts and their impact on NCO, unit, and mission effectiveness.
3. Predict the impact of Team Leader concepts on NCO, unit, and mission effectiveness.

AFFECTIVE OBJECTIVE: Value Team Leader concepts and their impact on NCO, unit, and mission effectiveness

PART IB

ORGANIZATIONAL PATTERN: Topical

ASSOCIATED LESSONS: CF04, *Full Range Leadership*, CF05, *Self-Awareness*, and SA05, *Leader Influence*.

PART IC

LESSON OUTLINE

CONTENT
INTRODUCTION: Attention, Motivation, and Overview
MP 1. Teams
MP 2. Team Mission and Vision
MP 3. Team Roles and Responsibilities
MP 4. Team Dynamics
MP 5. Stages of Team Development
MP 6. Preferred Team Member Roles (Electronic Team Members Preferred Role Estimator- e-TMPRE)
CONCLUSION: Summary, Re-motivation, and Closure

PART II

STUDENT READING

MP 1. TEAMS

Did Steve Jobs create the world-dominating Apple Company alone? No, he was successful because he was able to successfully lead a team, with a very specific mission and vision. The same goes for your work center. As soon-to-be leaders and supervisors, you must understand why developing a team is so critical to maximizing work center effectiveness. How teams are developed depends upon a few key factors. First, you must have a good understanding of key attributes of teams. Second, you must know and be able to communicate your team's mission and vision. Third, you must fill your role as a first-line supervisor and team leader; this requires you to know how to balance team roles and responsibilities to accomplish the mission. Fourth, you must understand a team is made up of people and how they work together (or team dynamics), and finally you have to understand the stages every team experiences in light of the interaction that occurs as team members accomplish their tasks. Let us begin by covering the difference between a group and a team.

Groups versus Teams

A team is a *group organized to work together*.¹ This may seem like a simple definition, but there are several aspects to review. This definition consists of a few critical attributes:

- *a group*
- *organized*
- *work together*.

A group is *an assemblage of persons or objects located or gathered together*.² From this, it is worth noting that *all* teams are groups, but not *all* groups are teams. The distinguishing factor seems to revolve around the collective effort toward a shared goal that all teams demonstrate. This collective effort explains the difference between a highly effective team and 12 people on a bus. While both collections of individuals qualify as a group, the individuals on the bus lack a collective effort toward a shared goal. It is true they share the common goal of traveling to their respective destinations—and some may even be going to the very same one—but they are not actively working together to achieve those goals; they are passengers in obviously passive roles.

The difficulty we have as leaders is getting our people to perceive themselves as more than a group, but as an actual team. Teams are committed to their members' personal growth. A team will outperform a group and all reasonable expectations of the individual members. This is because a team has a synergistic effect; one plus one equals a lot more than two.

Some of our work centers suffer from this lack of collective effort, and view themselves as collections of individuals simply tasked to do their part until members PCS, separate, or retire. This is usually because they do not know, understand, or buy in to their mission/vision.

MP 2. TEAM MISSION AND VISION

Mission Statements

Mission statements define the "where and what" work centers, units, wings, etc. accomplish on a daily basis.³ They define the fundamental purpose of an organization or an enterprise, succinctly describe why it exists and what it does to achieve its Vision.⁴

The Department of Defense Dictionary defines Mission as, *"the task, together with the purpose, that clearly indicates the action to be taken and the reason therefore...a duty assigned to an individual or unit; a task."* Regardless of specialty, organization, duty location, or rank; as Airmen, it is our purpose to proudly serve the American People and partner nations by accomplishing the Air Force Mission:

"Fly, fight and win...in air, space, and cyberspace."

As Airmen, we are all part of a unique and outstanding team expected to produce results that contribute to fulfilling this mission. The above statement acts as a focal point or lighthouse that motions our Air Force toward a common objective. It is imperative to completely understand and accept your team's mission before you can influence and motivate others to commit to it. One method we use to assist in guiding our personnel is a *mission statement*.

For instance, Air University's Mission:

*"We produce the future. We launch leaders of character, educated to think critically, strategically, and jointly to master and deliver superior Airpower in support of national security objectives."*⁵

The Thomas N. Barnes Center for Enlisted Education is a subsidiary of The Air University whose mission statement is to:

*"Educate enlisted Airmen to accomplish the Air Force Mission"*⁶

Management is in place to oversee the organization's various functions, academies, programs, and processes to ensure the Barnes Center team meets its mission to *"Train, Educate and Graduate"* today's enlisted force in relevant skills and competencies.

Understanding the organization's mission is critical, but when coupled with an understanding of the Vision, leaders increase their leadership competency.

Vision Statements

As a Mission defines the purpose of an organization, a Vision defines that purpose in connection with the organizations values.⁷ Vision also considers what the organization

wants to be (a preferred end state or how the organization should operate in the future or ideally). It is a long-term view and concentrates on the future and can provide the “how well” when it comes to accomplishing one’s mission. For example, the Barnes Center’s mission is about “training, educating, and graduating Airmen.” When that is connected with the Vision of “World-renowned center for enlisted education” it shows the leaders and members of the Barnes Center that when they are training, educating and graduating it must be done with excellence, and done in a fashion that when other nations look at our PME they see it as something to emulate. This is the preferred end state.

Just as the team must know and understand the Mission and Vision, they must also understand what is expected of them to accomplish that mission. If the leader does not clearly articulate expectations, the outcome may not be what the team needs. Leaders must articulate guidelines showing appropriate ways to fulfill the expectations.

All together these concepts look like this: The team or work center has a Vision, which is where you desire to be, an ideal state, where the team wants to go according to the values important to the team. The required actions to work toward the Vision are included in the Mission, which is why the team or work center exists. The expectations are the particular standard to which the actions to accomplish the Mission must be performed. Finally, there are certain ways the expectations should or should not be accomplished; these are the guidelines. Understanding all of these will make the team more effective. There is one individual that is responsible for projecting and articulating the vision, mission, expectations, and guidelines. That is the person who “has to see the future, chart the course, lay the plans, architect the team and spawn creativity.”⁸ That person is the Team Leader, which is one of the Team Roles.

MP 3. TEAM ROLES AND RESPONSIBILITIES

Great teams achieve success for a number of reasons. At the top of the list is the effective fulfillment of roles and responsibilities. When these roles and responsibilities are understood and then applied, the team usually achieves, and oftentimes exceeds, the goals set forth in its path. There are many roles played out on a team but there are two major ones, the Team Leader and the Team Member. So let us look at these roles and their corresponding responsibilities.

Poet Edward Everett Hale once wrote:

*I am only one,
But still I am one.
I cannot do everything
But still I can do something;
And because I cannot do everything
I will not refuse to do the something
that I can do.*⁹

Team Leader

In the book, *Team Work and Group Dynamics* (1999), Greg Stewart remarks that the team leader is the person who manages the team. Ordinarily, a team leader is a supervisor or manager in the project area. Because he or she is so close to the project, he or she will be better able to guide the members of the team. It is important for the team leader not to dominate the group. He or she should also practice active listening and participate in discussions only as much as necessary depending upon the maturity and experience levels of the team. This participation and active listening should encourage other team members

to become more active.

An effective leader must learn to control the urge to over-direct the team. There must be a middle ground between providing no direction and being over-directive.¹⁰

—*Everyone is accountable, all the time.*||

Rudolph W. Giuliani

Role of the team leader: Manage the team: calling and facilitating meetings, assigning administrative details, and organizing all team activities. Additionally, the team leader:

- Represents the team to senior leadership
- Provides guidance and direction
- Focuses on team goals, behaviors, and standards to accomplish the mission
- Listens actively and encourages total participation
- Promotes open and clear communication
- Rewards the team for performance
- Creates a non-threatening environment
- Articulates mission, vision, expectations, and guidelines

Responsibilities of the team leader include communication skills, human relation skills, and participation skills.

Communication Skills – skills a team leader employs to foster the communication process on the team. In order to accomplish this, the team leader must take actions based on certain communication skills. These communication skills are:

- The ability to speak effectively in order to clearly articulate mission, vision, goals, expectations and guidelines
- Consistent verbal and nonverbal communication
- The use of clear and concise terms
- Provide accurate direction on the methods that'll be utilized to achieve team goals
- The ability to express ideas clearly in a written format
- Apply the skills of an effective listener

Human Relation Skills – human relation skills are those things the team leader applies to promote effective team member relationships and interaction within the team. The appropriate actions are dependent on the leader possessing certain skills. These skills are:

- Quickly, decisively, respectfully, and clearly inform members, face to face, when not meeting the standard

- Ensure all members of the team feel a sense of belonging and importance
- Be able to deal with team conflicts in a way that doesn't keep it from its goals
- Decide how much direction to use in order to not hurt the esteem of team members
- Recognize the valuable input of each team member and give out encouragement as necessary to keep team members motivated
- Ensure task needs are met without completely disregarding the individual needs of team members

Participation Skills – participation skills are those things the team leader possesses to act as a functioning, contributing member of the team. They consist of:

- Know when to back off and allow the team to function on its own
- Know when to provide direction to the team in order to keep their focus on the task
- Know when their level of participation is too much which could cause some team members to abstain
- Be careful of too little participation which may be regarded as weak leadership by team members

Just as a flock of geese has a head goose that leads the “Flying V”, the head goose has a team behind it, cheering it on and completing the rest of the team as the team members.

Team Members

Team members, for obvious reasons, make up the bulk of the team. They are usually functional experts in their respective areas and bring a wealth of ideas to the team. Their contributions to the success of the team's goals and objectives can never be underestimated. It is important for the leader to know and understand each member, and his or her skills, talents and personality. With this information, the member can be put in the best position to effectively contribute to the team. Furthermore, with this information, the team member can surpass contributing and be the best fit for a particular responsibility. This ensures he or she not only fulfills the need of the team, but also fulfills his or her need to feel valued. This concept is often referred to as —aligning versus assigning.‖ If a team leader can align a team member to a particular function according to what they are good at and enjoy doing, the team has a happy, motivated member and has the best person fulfilling that particular responsibility.

Role of the team member – The primary role of the team member is participant, that is, one who actively participates. This role is fulfilled through:

- Sharing knowledge and expertise
- Participating in all meetings and discussions

- Carrying out all assignments
- Being creative
- Supporting all team efforts
- Seeking challenges

Responsibilities of the team member – Just like the team leader, team member responsibilities are communication skills, human relation skills, and participation skills.

Communication Skills – In the case of the team member, the purpose of communication is primarily to provide accurate information to other team members and the team leader. This information serves as a basis for decision making, education, and training. Additionally, interpersonal skills become very important for team members as they interact with other members on the team.

Human Relation Skills – Team members must be aware of how their ability to relate to, and get along with, other members of the team directly influences the success of the team. They should also be cognizant of factors that motivate other members on the team and work toward building an environment of harmony.

Participation Skills – Input sought by the group dictates much of a team member's participation. Members need to be assertive and respectful and always seek out opportunities to be creative. This area is very important for the member to understand because this is something that the Leader cannot accomplish alone; the leader must have participation from all of the members for the team to operate to its full capacity. When all members of a team participate, the synergy created increases the team's problem solving capability exponentially.

To Lead or to Follow, that is the question.

The leader is responsible for the direction of the team and to make that happen, there will be times when, for the betterment of the team, they must be willing to follow and allow a member to step up to the leader position. As the team leader, it is important to recognize this, act on it and encourage others to do the same. For example, the team leader is not the expert on everything. He or she must recognize this and provide the expert the latitude to lead in that arena.

There is also a good chance the team leader's team is also part of a bigger team. In this case, it is important for the team leader to recognize that he will not be in charge but must follow the leadership above him or her, e.g., NCOIC, shop chief, superintendent, commander, etc.

Additionally, according to Lt Gen (retired) Russel L. Honore, the Joint Task Force commander for the Hurricane Katrina disaster, those that make up your team often times fit into three different categories and it is important to take the time to listen to all three.

“[The first group] claps every time the boss says something, and is willing to do whatever it takes to be on the team and be solid key players. The [second group] does not cheer, but they get it done. The third group consists of the mavericks. They could be the most

productive, because they may say, "Yeah, this is what the boss says, but this is what the organization needs." Some of your best innovation may come from the mavericks. All three groups give balance to an organization."¹¹

As team leaders and team members, it is critical to understand that your people are what make up the team; managing and leading them appropriately will increase the chances of having a successful team. Unfortunately, some say, "Establishing a dynamic that brings about the best in each player is one of the toughest acts of leadership."¹² Understanding how the people work together is called team dynamics.

MP 4. TEAM DYNAMICS

Definition:

"Team dynamics is an ongoing process involving interaction of individuals within a team to achieve the desired objective."

This definition contains three critical and interrelated attributes.

1. The term *"ongoing process"* allows us to visualize never-ending, dynamic actions. The process of team dynamics is one in which we will be involved for life—or at least as long as we are team members.
2. *"Interaction of individuals"* relates to the heart of the process. Interpersonal relationships are inherently associated with Team Dynamics. It is here that individual team members find satisfaction because of the existence of the team. We also have to understand that the motivational needs are quite often different for each member of the team. Status or self-esteem may motivate some members while others may need power or social relationships. The key is satisfying these differing needs based, at least in part, on membership in the team.
3. *"Achievement of the desired objective"* is the attribute that separates a team from a group. It is the collective effort to reach the desired objective mentioned earlier and is the real reason for the team's existence.

Groups are usually formed without consideration to each person's skill set. Groups evolve from members with random and overlapping skills and abilities. These people usually are considered crowds with no defined purpose to direct their various talents toward.

Teams, on the other hand, are more organized as members become aware of their partner's skills and responsibilities (roles).

Cohesive teams have the ability to realize the needs of their teammates, are considerate of their strengths, and use these strengths and needs to help the team reach its objective.

It is this understanding among team members that proves vital to the team's development and overall success and is the epitome of teamwork.

Webster's dictionary defines teamwork as:

*"Work done by several associates with each doing a part, but all subordinating personal prominence to the efficiency of the whole."*¹³

Whether you work for a small-town grocery store with ten employees or a squadron with two hundred assigned, your organization's success is a result of teamwork. Without teamwork, people are likely to pursue their own personal dreams and agendas, allowing the mission to sit idle. However, effective teamwork directs the energy of all towards one concerted effort, which typically leads to incredible results. Teamwork not only benefits the team but also the member because "Good teamwork makes each team member better."¹⁴

You can see that teams are different from groups because members have a commitment to each other, along with specific roles, skills, and experiences. Without the commitment to each other's and the team's success and growth, you only have a group of people. There is nothing special about a group, but a team gets the job done with a focus on each other's success and the task at hand. A team is not suddenly successful; all teams go through a growth process in stages of development.

MP 5. STAGES OF TEAM DEVELOPMENT

All teams start as a group and gradually or rapidly head toward the goal of becoming a team. According to Psychologist Bruce W. Tuckman¹⁵, teams progress through five predictable stages to maturity. Understanding these stages helps teams recognize, accept, and work through issues big and small to become a well functioning team. Overreacting can be detrimental to a team in achieving its goals and often causes members to take things too personally. One thing is certain, no matter how well team members work together, the progress is usually never smooth.

Forming Stage

When a team is forming, members cautiously explore the boundaries of acceptable group behavior. Like hesitant swimmers, they stand by the pool, merely putting their toes in the water. This is a stage of transition from individual to member status, and of testing the leader's guidance both formally and informally. Because there is so much going on to distract members' attention in the beginning, progress on work or team goals is slow. This is perfectly normal.¹⁶

During this stage, everyone is on his or her best behavior and group members become acquainted with each other. Every team begins with this initial stage of team development. After the initial excitement and enthusiasm during the forming stage, team members are likely to realize there is work to be done. Conflict is usually absent in this stage. The rules for behavior seem to be to keep ideas simple, say acceptable things and avoid controversy, avoid serious topics and if sharing feelings, keep feedback to a minimum and avoid disclosure. Team leaders incorporate introductions and socials, e.g., ice breakers, to accelerate the team's forming process and introduce the team's objective. When a team is ready to grow beyond this forming stage, it enters the storming stage.

Storming Stage

This is probably the most difficult stage for a team. This is where team members want to know the goals and objectives. It is as if members jump in the water and, thinking they are about to drown, start to thrash about.

They begin to realize that the task is different or more difficult than they imagined, and become testy, anxious, or overzealous. Impatient about the lack of progress, but still too inexperienced to know much about decision-making or the scientific approach, members argue about what actions the team should take. They try to rely solely on their personal and professional experience, resisting any need for collaborating with other team members.¹⁷ Individuals are trying to see where they can contribute, how they fit in, and how they can be productive and valuable. This is usually where tensions build—especially if there are others with the same expertise, or if individuals feel inadequate. Obviously, Team Dynamics play a huge role here.

During this stage, a team member may try to rationalize his or her position and spend considerable time trying to convince the team to take the action he or she feels is appropriate. This is how cliques begin to form. Conflict within the team rises to a higher level in this stage than during any other stage. The team does not have a strong sense of camaraderie and some members may feel very uncomfortable as latent hostility is expressed. Some members may become very quiet and some may become very vocal as tensions rise. Team leaders are encouraged to clearly define the team's goals and objectives at this point. The intent here is to focus the members on the objective and the reason why the team exists. Though it may not seem possible, there is some productivity as the team slowly progresses toward a unified direction.

However, if members click immediately, there is less confusion and conflict, the easier it is to define objectives or goals, and the faster the team appears to agree on them. This is also the case if members have worked together before. As the storming stage subsides and team members become accustomed to working with one another, the team begins easing into the Norming stage of team development.

Norming Stage

During this stage, members reconcile competing loyalties and responsibilities; there is an attitude change. They accept the team, team ground rules (or “norms”), their roles on the team, and the individuality of fellow members. Emotional conflict is reduced as previously competitive relationships become more cooperative. In other words, as team members realize they are not going to drown, they stop thrashing about, and start helping each other stay afloat. As team members begin to work out their differences, they now have more time and energy to spend on their work, so they are able to start making progress.¹⁸ Productivity is high in the Norming stage. With greater collaboration and a more conducive environment for production, the team may transition into the *performing* stage

Performing Stage

By this stage, the team has settled its individual relationships and expectations. There is a sense of high morale, team loyalty and trust. Members begin diagnosing and solving problems, brainstorming, and choosing and implementing changes; creativity is high. Team members accept each other's strengths and weaknesses and understand their roles. Now they can swim in concert.¹⁹ The team is now an effective, cohesive unit.

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You can tell when your team has reached this stage because you start getting a lot of work done. Productivity remains high as the team makes steady progress.

One very important point to bring up before moving on to the adjourning stage focuses on personnel changes. If a new person joins the team, the team WILL go back to the Forming stage. Quickly and effectively integrating the new person into the team is very important and can help the team spend minimal time going back through the Storming and Norming stages and onto the Performing stage.

Adjourning/Transforming

The final stage of team development is Adjourning or Transforming. Adjourning is often the case with most short-term AF teams (i.e., tiger teams, project teams, etc.). Adjourning takes place as the team begins to break up and individual members move on to other activities. Most times Adjourning is planned, like when a temporary team completes its objectives and no longer has a reason to function. External constraints such as organizational mergers and downsizing can also cause a team to terminate before it completes its known objectives.²⁰

On the other hand, transforming teams continue to exist, moving from one objective to the next. After achieving one goal, the team immediately focuses on its next mission. Rather than Adjourning, Transforming teams remain together with the occasional loss of some members (PCS, PCA, Retirement, etc.) and the addition of other members whose expertise and familiarity of the new goal prove beneficial to the team's next success. What can be done to help the team effectively move forward its development? Let us look.

MP 6. PREFERRED TEAM MEMBER ROLES

By now, you've learned a considerable amount of information about being a part of a team. In addition to the concepts and principles discussed above, we all have our own particular preferences and preferred ways of thinking, acting and interacting within a team. This main point complements the *CS05 Self-Awareness Lesson* by further aiding you in understanding your and others preferred team members' roles by utilizing the Barnes Center's Electronic Team Members Preferred Role Estimator (e-TMPRE) assessment.

Preferred Team Member Roles

Creator: **Creators focus on the possibilities.** They generate new ideas and fresh concepts. They prefer to live in a world of possibilities. Creators look for activities that are unstructured or abstract, and they thrive on innovation and unique solutions. Creators are good at reframing a problem and looking for outside the box solutions.

Creators are not limited by fear of reprisal or failure, or by existing rules, regulations, or boundaries. Creators "see" problems or situations from a globalist perspective so they are often able to recognize alternatives that others may miss.

Creators are:

- Spontaneous, exciting, enthusiastic, and great at brainstorming ideas

- Typically, the ones who offer a fresh perspective
- Offer bold, untried approaches and ideas
- Able to see the “big picture”
- Optimistic and visualize the possibilities
- Willing to solve problems

After ideas are created, savvy team leaders hand them off to the *Advancer*.

Advancer: **Advancers focus on the interaction.** They communicate new ideas and carry them forward. Advancers manage the human component of any solution and enjoy whipping up enthusiasm for a project. Advancers recognize ideas and new directions in their early stages and develop ways to promote them.

Advancers use insightful planning based on their past experiences and successful methods to “advance” ideas towards implementation. Advancers prefer familiar ideas but are not inclined to let rules and boundaries discourage them. Actions are directed toward achieving objectives by the most direct and efficient means.

Advancers are:

- Positive with self-confident attitudes
- Insightful planners and use past experience to guide success
- Energetic supports of team goals and objectives
- Well-developed promoters
- Persistence in championing and advancing new ideas
- Not easily discouraged

An Advancer recognizes new opportunities, develops ways to promote ideas, and moves toward implementation. It is critical for them to be open to what should happen next; this is when you as a knowledgeable team leader turn to the *Refiner* on the team.

Refiner: **Refiners focus on the analysis.** They challenge all concepts. They use a methodical process to analyze things in an orderly manner to detect possible flaws and identify potential problems under discussion.

Refiners are good at reviewing ideas and implementation plans, modifying those ideas or coming up with new ideas, and rationally reviewing them to ensure successful implementation. Refiners use logic and a systematic approach to redesign a solution, and they make sure that ideas are sound before moving them to the next level.

Refiners are:

- Able to identify and clarify possible problems
- Detail-oriented
- Experts in specifics and the development of a sound implementation strategy
- Analytical
- Able to offer new ideas and alternatives
- Practical “sounding boards” to validate ideas

As the Refiner challenges and analyzes ideas and plans, they are often passed back and forth among the Advancer, Creator, and Refiner until the Refiner is satisfied that the idea or plan is ready for implementation by the **Executor**.

Executor: **Executors focus on the realization.** They follow up on team objectives and implement ideas and solutions. Executors deliver concrete results and seek successful implementations.

The Executor focuses on ensuring the implementation process proceeds in an orderly manner, based on a well-thought-out plan. Executors strive for achieving high-quality results, with attention to details.

Executors prefer to let others take the lead on creating and refining ideas because they enjoy the task and responsibility of final implementation. Executors pride themselves on their ability to meet objectives professionally and efficiently.

Executors are:

- Willing to implement ideas
- Meticulous in following directions and completing tasks
- Assertive
- Independent
- Keepers of high standards
- Able to bring up problems early enough to effectively solve them

The Executor lays the groundwork for implementation, manages the details, and moves the process to completion. Another role you need to be aware of is the **Flexer**.

Most people will have one or two preferred roles, a primary and a secondary. There are some instances where a person may have up to three to four equal preferences, these people fulfill another role known as the **Flexer** role.

Flexer: **Flexers can often adapt their styles** to fit the needs of the team, and they probably view issues from different perspectives.

Given their ability to adapt their style, Flexers are very good at monitoring contributions of all team members and filling the gaps in order to keep things moving in the right direction.

Flexers are:

- Able to connect and negotiate with all types of people
- Tolerant and understand different members of the team
- Able to identify what is missing in the process, and fill in the gap to allow for uninterrupted progress
- Willing to offer suggestions to improve the process

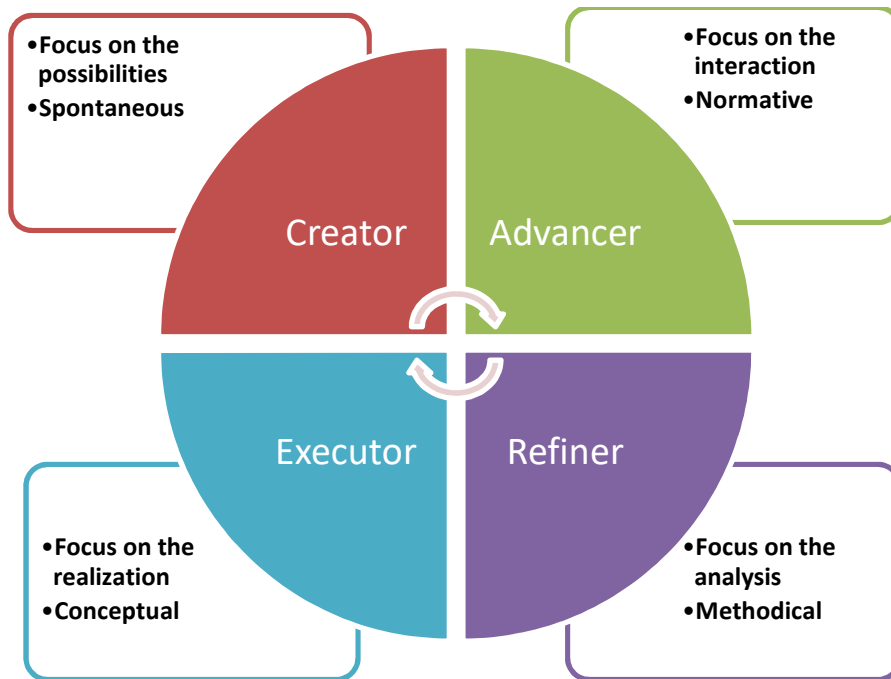


Figure 1. Preferred Roles/Approaches

Approaches

In addition to the preferred roles, there are four approaches which also describe ways in which we behave in a team environment.

1. Spontaneous (Less Structure – Extemporaneous)

- Wants freedom from constraint
- Likes to have respect and influence
- Don't feel obligated to follow tradition
- Let's their feelings guide them when making decisions
- Tend to move from one subject to another, focusing on many things at once, and sometimes showing impatience

2. Normative (Conventional/Traditional)

- Tries to fit in with other people
- Prefer to let others take the lead
- Prefers to put ideas into a familiar context
- Likes to see the consequences before acting
- Let's accepted norms and expectations steer them
- Relies on past experiences with similar situations to guide them

3. Methodical (More Structure – Systematic)

- Prefers order and rationality
- Likes to see things fit together
- Good at putting things in order

- Prefers to focus on what they prove is true
- Tend to follow a step-by-step process when presented with a problem
- Prefers to examine details and thinking things over carefully before acting

4. Conceptual (Abstract, Theoretical)

- Prefers to focus on the future
- Good at recognizing alternatives
- Likes to come up with new ideas
- Good at visualizing the master plan
- Likes to develop theories, principles, and ideas
- Good at exploring alternatives and discussing concepts when presented with a problem or an opportunity.

Stages of the “Z” Process

Team leaders and team members are more effective when they recognize and utilize the “Z-process” and account for the Panic-Elation-Panic (PEP) cycle. The following are brief descriptions for each role, which are a combination of two approaches.

Creating

During this stage, new ideas are born. Team members look at problems from perspectives that are unusual and unique. Discussions are conceptual and focus on the “big picture”. The atmosphere is receptive, open, and uncritical.

Advancing

During this stage, the team gives new ideas more structure and considers broad strategies for implementation. The team communicates its ideas to the larger group in an effort to show everyone how the idea is valuable and clarify the role they might play in the project.

Refining

During this stage, the team scrutinizes new ideas to see if they are realistic. The team analyzes in an orderly fashion to find flaws and avoid problems down the road. Detailed plans for implementation are developed and evaluated.

Executing

During this stage, the team puts ideas into action; following through on the plan to get concrete results. The team focuses on details and makes progress through an orderly, well-thought-out process.

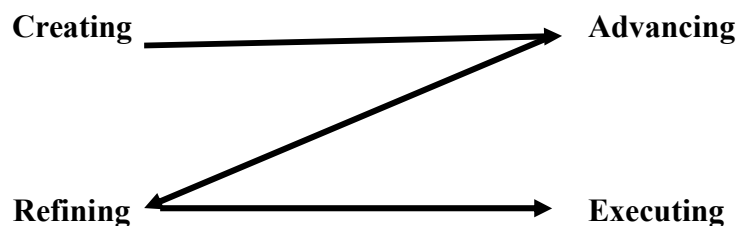


Figure 2. Z-Process

The PEP (Panic-Elation-Panic) Cycle

The P.E.P. Cycle begins with the call for ideas in order to reach a specified team goal. At this point, all team members panic as they attempt to come up with ideas.

When brainstorming begins, the Creator's Panic lasts only a few seconds as they immediately visualize all the possibilities and produce ideas. Other members come up with ideas too, but the Creators are almost always the first to respond with new and innovative ideas. Creators quickly move up the "bell curve" to Elation as every idea is a "great idea" to a Creator.

However, without the Advancer's encouragement, (or encouragement from the team leader) even creators return to Panic. Advancers help Creators by offering support and encouragement without critical judgement.

When other team members come up with an idea, they also move from Panic to Elation simply because they "thought of something" but most quickly return to Panic because they immediately begin doubting their own ideas.

When brainstorming begins, Refiners are usually unable to offer any ideas until they have more information and so they remain in Panic mode. Therefore, instead of generating ideas, Refiners observe the interaction between the Creators and Advancers, scrutinizing (analyzing) every proposal. They examine ideas, considering facts and logic, to determine whether they are reasonable.

Some of the ideas may be confirmed as unacceptable which will cause Creators to "slide" back to a state of Panic until the next "great idea" evolves.

Ideas often bounce back and forth among the Creators, Advancers, and Refiners in what's called the "Z" process. The Creator comes up with an idea and as the Advancer begins promoting it, the Refiner begins analyzing it.

The idea might go back and forth several times before the Refiner (along with the Creator and Advancer) agree the idea is ready to pass off to the Executor who has been waiting for an idea to come to fruition (realization) then moves the idea into production. Flexers assist the other roles by satisfying the unfulfilled needs of the team in order to reach the goal.

Effective management is required throughout the cycle to make sure the team succeeds. Without continuous leadership involvement and oversight, Creators are likely to continue developing ideas, gaining support from the Advancers and criticism from the Refiners. In the meantime, the Executor waits impatiently idle, waiting for the call to action. It is up to the team leader to:

- Recognize when Creators (as well as all team members) reach Elation, and look to the Advancer to help move the idea forward before panic sets in again
- Involve and encourage Refiners at the appropriate time, to ensure ideas/solutions are feasible, and if not, eliminated
- To utilize the Creator-Advancer-Refiner loop of the Z-process as many times as necessary to ensure that only sound, feasible ideas/solutions are handed off to the

executor for implementation

Becoming aware of your own preferences/approaches, as well as the preferences/approaches of other members of a team, can help you:

- Better understand why you prefer a particular role on a team;
- Contribute to the team's ability to solve Problem A while managing Problem B
- Enhance the overall team performance
- Lead teams more effectively.

DO NOT confuse preferred role with ability-we all have the ability to fulfill any one of the roles, we just prefer the role that feels most comfortable and natural to us. Never stifle yourself or others by assuming people can only fulfill one role on a team.

Regression of a Team's Development

A team proceeds through these stages only as far, and as fast, as its members are willing to grow. Each member must be prepared to give up something at each stage to make the move to the next stage. Here are some causes for regressing and methods to assist in recovering a high-performance team.

New Member: New personnel can affect interpersonal relationships in ways that upset or reinforce team dynamics. Regardless of what stage teams are at, more often than not, they return to the Forming stage or panic stage of the PEP cycle in order to develop a relationship with the new members. New members learn details regarding the goal, their role, and expected performance and behaviors. Teams may quickly progress through the stages to get back to where they were, it all depends on how well new members interact and are accepted.

New Goal: A new goal often sends teams back to the Storming stage as they determine a new strategy or plan and reassign roles. Explaining the reason for the change in mission (creating a felt need for the change) and encouraging participation in role selection while cultivating a cooperative environment can minimize the time spent in the Storming stage.

Team Schedule: Altering a team's schedule can affect performance because activities and roles usually change too. These changes cause stress, which leads to conflict (Storming). Leaders anticipate the potential for elevated tension and take steps to mitigate conflict by maintaining open channels of communication and encouraging members to communicate their concerns.

Unresolved Conflict: When conflict occurs, perceptive leaders quickly determine whether the conflict is constructive (positive) or destructive (negative) and if it is destructive, they take immediate steps to manage the issue. Leaving conflict unresolved allows team members to "take sides" creating even more conflict and drawing the team's focus and momentum away from the goal, and reducing its productivity.¹⁴