Hyper Island

Managing Projects and Teams

Reflection on projects and teams best practices and the development of a team autonomy canvas

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Introduction

This research activity aims to analyze and critically evaluate then synthesize best practices in Managing Projects and Teams and proposing an effective collaboration tool regarding teams in the team stage of counter-dependency and conflict.

Project management exists due to transform a vision into reality, so there is a vision of some future state that we would like to achieve (Turner 2008). Furthermore, to manage a project, there are methodologies, that can be frameworks or mindsets, that will help the manager frame the project execution into doable steps.

Methodologies like Agile and Lean focus on shorter cycles to learn as soon as possible to improve the output, whether it be a product or a service. On the opposite, Waterfall is a methodology focused on predictability, pre-planning schedule, budget, resources, and drawing a plan with milestones. Unlike those methodologies, design thinking is not focused on executing a project but is about discovering the right thing to be built.

It is impossible to touch upon project management without discussing team management because there is a need for a group of people with a common goal, called a "team."

Managing teams is about managing people in a 360-degree perspective, not considering only team players as employees or colleagues but also as humans. So the leadership style has a significant influence on team behavior, and if not set correctly, a leadership style can de-rail a team setup. For example, in a professional soccer team, the incidence of severe injuries was 29%–40% lower in teams where coaches communicated a clear and positive vision of the future, supported staff members, and gave staff encouragement and recognition (Ekstrand *et al.* 2018).

Managing Projects

"Building the right thing and building it right"

As describe by Hyper Island, a *project* is the means to convert a vision into reality, so it is a combination of contents and processes. This model is known as "The Walnut." As we can see in figure 1, everything starts with a purpose that will lead to the desired outcome, and in between, there will be content and a process.

The project domain will define the content section. Regarding the process, methodologies like Design Thinking and Lean will help the team validate an idea with user research, problem statements, and pivoting if needed. This experimentation will help the team identify the right thing to be built, and then the next step is moving to a methodology to build it right.
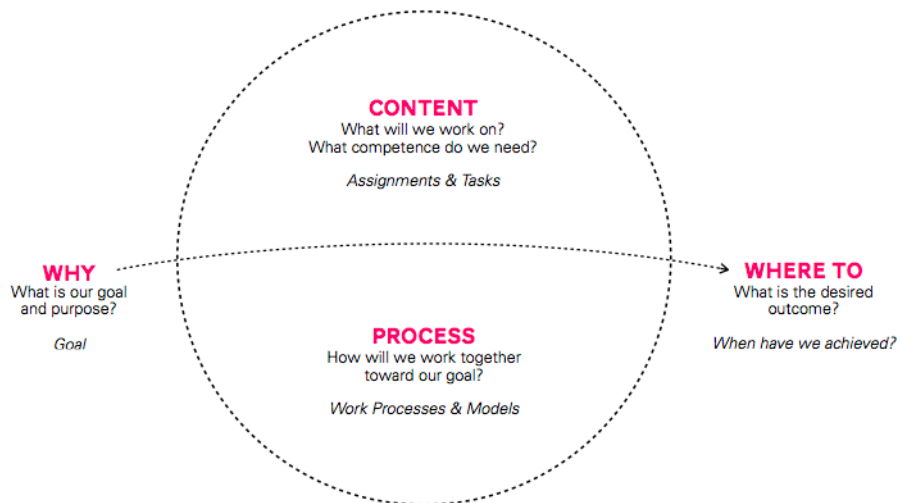

FIGURE 1: "THE WALNUT" MODEL

Nowadays, mainly in the software industry, there are multiple project management methodologies. According to (Vijayasarathy *et. al* 2016) from research done at the PMI (Project Management Institute), well known for providing project management certification, the most used methods are Waterfall and Agile. It concludes that deciding which method is critical at the beginning of the development of a project. Let us compare the "walnut" model for successful, figure [2], and non-successful, figure [3], projects based on Möller's experience. It is

FIGURE 2: PROCESS AND CONTENT DISTRIBUTION FOR A SUCCESSFUL PROJECT

needed to dedicate time to define a team process, so focusing on finding a common goal is more important initially, and this process dedication decays over time (Möller, 2015). During this time, the team's development must be
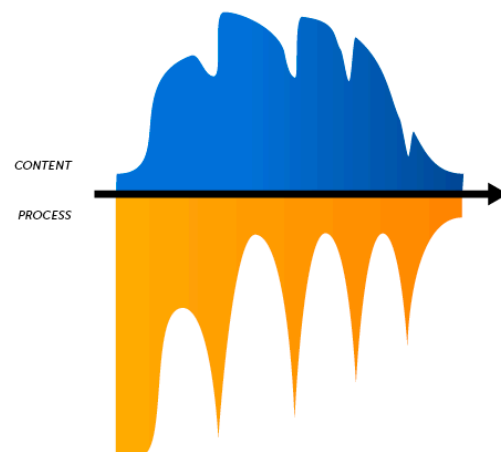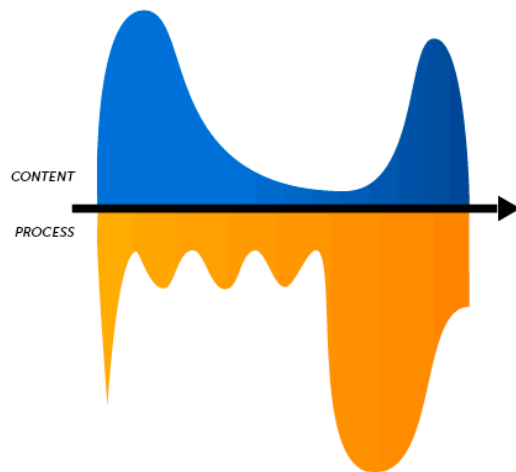
FIGURE 3: PROCESS AND CONTENT DISTRIBUTION FOR A NON-SUCCESSFUL PROJECT

the leader's most significant effort to create a space with psychological safety and trust to enable the team to thrive.

The selection of a methodology is never a deterministic exercise. The selection will likely consider several contextual factors, including organizational, project, team characteristics, and market and operational forces (Vijayasarathy et. al 2016), so there is no best methodology. However, it is part of the process to understand the team's context to define an own approach.

In tech companies, Waterfall has been losing its space to iterative methodologies. If we consider that we live in a VUCA world, that means vulnerable, uncertain, complex, and ambiguous, (Millar 2018), dedicating months or years to a project without testing is a waste of resources.

Also, the buzzword "fail fast" has been the main driver of tech startups, and the relationship between this motto and Agile and Lean is wrongly defined (Pontefract, 2018). The key behind this motto is learning fast from the iteration with direct customers. The absolute failure is not learning from its iterations. As described by (Schlecsker, 2020), this motto could be reproached to "fail early & fail cheap" to minimize the impact of the failure for your project, which matches with Agile and Lean methodologies.

In this sense, an agile mindset is a powerful tool. It shortens the customer feedback loops as this is about to have a working product instead of documentation. Its implementations like Scrum provide a framework that focuses on rituals to enforce communication and accountability in the teams. Communication failures and misunderstandings lead to problems in maintaining mutual knowledge in virtual work (Barlow *et al.* 2016), and rituals can improve the common understanding of the team.

It is crucial to say that design thinking, Lean and Agile are not mutually exclusive. However, the methodologies have different timings, as illustrated by Gartner in figure 3, so the project leaders must understand how to select a methodology that better fits the project stage properly.

Also, as a pandemic hit us in 2020, most teams have moved from an in-person setup to a remote location, and we are using virtual communication channels. It is more difficult for groups to converge virtually than in person (Barlow *et al.* 2016). Hence, rituals like daily stand-ups help improve team communication, and with shorter development cycles, it is easier to evaluate the outcome and guide the following iterations accordingly.
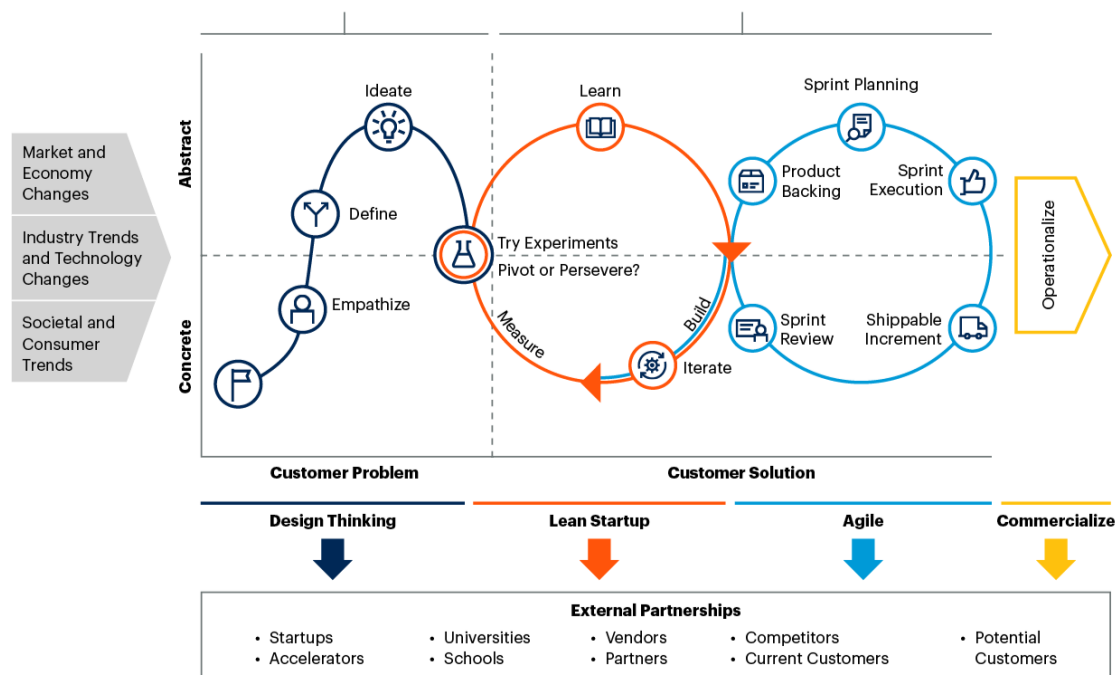
FIGURE 4: GARTNER'S MAPPING ON PROJECT METHODOLOGIES

Being Agile and COVID-19

Currently, organizations confronting the realities of a COVID-19 world find themselves managing challenging and unprecedented demands (Worley *et al.* 2020). As we already described in the VUCA world, events like the pandemic scenario are possible to happen. However, most executives avoid thinking through nightmare scenarios as fear prevents them from exploring extreme possibilities (Worley *et al.* 2020).

Agile organizations are better equipped to handle volatility because their sensing capabilities prepare them to act quickly on even the most remote eventuality (Worley *et al.* 2020). However, as we saw some companies' behaviors during the pandemic, they were not prepared for it. Companies that benefited from the change started to rethink their ways of working, re-

imagining the structure and reshaping their talents, for example, making the hybrid work, work! (De Smet *et al.* 2020).

It was demonstrated that Agile companies outperformed others to adapt to the current scenario (De Smet *et al.* 2020). As confirmed, agile teams have continued their work almost seamlessly after the shock, without substantial setbacks in productivity.

Reflection

During the experience of working with short-term teams that never had the opportunity to meet personally, it was clear that at the first moment defining rituals, team roles, and finding a common purpose for the team was vital to guide our projects.

Rituals were vital to set the pace and focus for the team. For example, during the Business Transformation, it was defined with the support of the Abracademy team a ritual that was executed at the beginning of each team meeting. This ritual, called "crazy hats," enabled the team to create a precise breakpoint in our non-project-related tasks and the beginning of the teamwork, enabling focus and creativity.

Roles and responsibilities were positively present in all teams' feedbacks, when the roles and responsibilities are clearly defined before the work to be done, for example, using the Team Canvas (http://theteamcanvas.com/).

The same happens when preparing for the meetings and rituals. Having clear roles of facilitation, timekeeping, and others, were beneficial to the team organization. Agile methodologies like Scrum also use specific roles with different responsibilities: Product Owner, Scrum Master, and the Dev Team (West, n.d.). These roles are not about job titles but responsibilities that provide a minimum definition to deliver work effectively.

Nevertheless, the primary topic on the feedback was respect, the opportunity to speak and express their feelings without judgment, attributes related to trust, and psychological safety related to our relationship as a team.

Managing Teams

Dr. Susan Wheelan had for more than 25 years dedicated her work to understanding group dynamics. She defines that group development as four stages and a termination stage if needed (Wheelan, 2014). For each team stage, there is a specific leadership behavior that improves the team's effectiveness. Not only behavior but communication style must be carefully

selected. For example leader's supportiveness seems to be the essential communication style variable, having positive relations with all leadership styles and outcomes (Vries *et al.* 2010).

Also, companies like KPMG and Google had focused much effort on understanding their teams to improve their effectiveness and verify if there was a standard variable that would make the team more effective. Their research concluded that a couple of attributes make teams effective: psychological safety, sharing values, and trust.

Success Factors

We all have our opinions and case studies (Bock, 2014). However, there is precious little scientific certainty around building great work environments, cultivating high-performing teams, maximizing productivity, or enhancing happiness (Bock, 2014). Moreover, if a company wants to outstrip its competitors, it needs to influence how people work and how they work *together,* called *"norms"* (Duhigg, 2016).

As defined by (Duhigg, 2016), norms are the traditions, behavioral standards, and unwritten rules that govern how we function when we gather: One team may conclude that avoiding disagreement is more valuable than debate. Norms can be unspoken or openly acknowledged, but their influence is often profound. The proper norms, in other words, could raise a group's collective intelligence, whereas the wrong norms could hobble a team, even if, individually, all the members were exceptionally bright.

Conscientiousness is the primary personality trait that predicts success in individuals (Baer, 2014), but not necessarily a team of successful individuals is an effective team. For many years companies were looking for the best individuals to form their best teams (Vries *et al.* 2010). However, they perceived that an individual's intelligence could not be higher than the team's collective intelligence.

The research by (De Jong *et al.* 2010) highlights the importance of trust, an often-neglected variable in this area of research (Kiffin-Petersen, 2004, cited in De Jong *et al.* 2010). KPMG's research revealed that employees whose leaders talked about purpose scored significantly higher on retention, brand, and purpose-related items than those whose leaders did not (re:Work, 2021b). Google project Aristotle highlights that the most impactful behavior in a great team is psychological safety (re:Work, 2021). Furthermore, according to (Turner, 2008) more equal participation has been found to improve group performance because it enables a greater sharing and integration of knowledge.

From the literature, we can conclude that no single trait or behavior can be considered a single success factor to improve a team's effectiveness. As leaders play a primordial emotional role, it pushes them to be more prepared to evaluate the current team stage and navigate their teammates' and colleagues' emotions to enable efficiency in teams.

Leadership

Some people believe that leaders are "born leaders." However, the fact is that leadership is learnable. Leadership skills are part of an unconscious repertoire of habits (Goleman, 2002) learned long ago.

Anyone with practice and learning is capable of becoming an effective leader. The point is that the old response will not magically disappear. It takes commitment and constant reminders to stay focused on undoing those "bad" habits (Goleman, 2016).

Susan Wheelan's maps behaviors can improve a team's efficiency depending on which stage the team is, so the leader can act more efficiently, table 1.
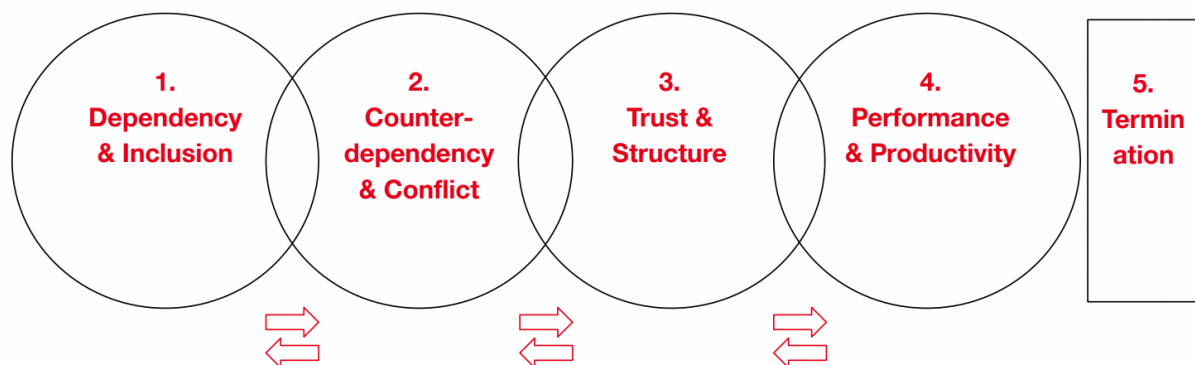
FIGURE 5: DR. SUSAN WHEELAN'S INTEGRATIVE MODEL OF GROUP DEVELOPMENT

The Open Loop

Every individual has an open-loop system, that is, the system that we get input from the outside emotions. Hence, scientists describe the open-loop as "interpersonal limbic regulation," whereby one person transmits signals that can alter hormone levels, cardiovascular function, sleep rhythms, and even immune function inside the body of another (Goleman, 2016).

So to lead, it is necessary first to take a step back to understand him/herself.

Understanding the values that guide us is the first step to lead from the inside, as proposed by Abracademy, a company focused on mind shift

STAGE 1	STAGE 2	STAGE 3	STAGE 4
DIRECTIVE, CONFIDENT AND ORGANIZED	HELP THE GROUP TO SOLVE CONFLICTS ABOUT GOALS, LEADERSHIP AND ROLES	ENCOURAGE MEMBERS TO TAKE MORE RESPONSIBILITY	PARTICIPATE AS AN EXPERT IN THE TEAM
HELP MEMBERS TO FEEL SAFE AND INCLUDED	DO NOT TAKE ATTACKS AND DO NOT RETALIATE	DELEGATE MORE RESPONSIBILITIES	MONITOR PROGRESS, PROCESS, PRODUCTIVITY AND EXTERNAL FEEDBACK
TALK POSITIVELY ABOUT THE GROUP TO THE OUTSIDE			
MANAGE THE EXTERNAL ENVIRONMENT, NEGOTIATE FOR NEEDED RESOURCE AND BUFFER THE GROP			

TABLE 1: DR. WHEELAN'S SUGGESTIONS FOR EFFECTIVE LEADERSHIP DEPENDING ON EACH TEAM STAGE

powered by magic, because knowing how do we fill will make us understand our impact on others.

Basically, the more open the leader is, the more readily others will feel that same contagious passion, and this type of leader quickly becomes emotional magnets (Goleman, 2016).

For a leader to be open and lead from the inside, they need to show that they are vulnerable, and vulnerability is a universal human emotion that we feel when we expose ourselves to others and during times of risk or uncertainty. For a person to feel safe to do so, trust is essential.

Building Trust and Safety

At the moment, a person is in a meeting, and the presenter asks, "Do you have any questions?" Moreover, no one speaks up, and that uncomfortable silence takes all the space. While we have some questions but we think twice before asking them. If this is happening, it shows that the person is in an environment with not enough trust and safety.
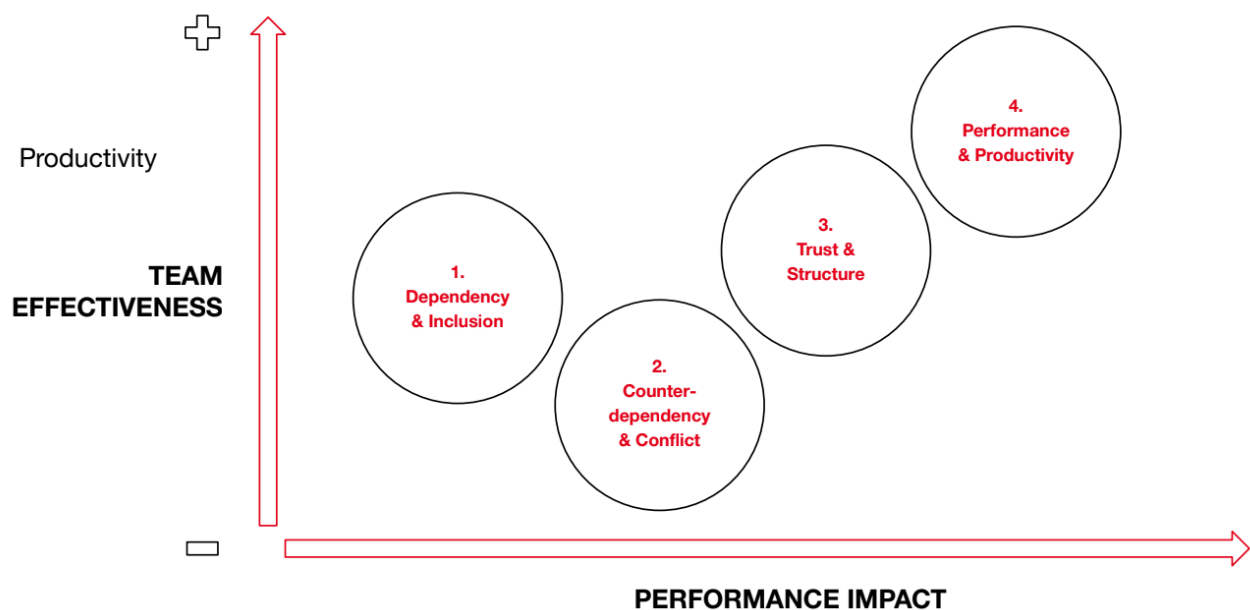
FIGURE 6: RELATION BETWEEN TEAM STAGES, EFFECTIVENESS AND PERFORMANCE IMPACT

No one wants to look ignorant, incompetent, intrusive and damaging (Edmondson 2014). Moreover, this works for self-protection! If a team member in an environment where there is psychological safety, they will be comfortable speaking up and questioning things and not being punished for trying it.

For a team to develop a shared sense of psychological safety and vulnerability, it is needed to create trust. Brown's research team has pinpointed seven different behaviors that encourage trust (Brown, 2018), expressed together with the acronym "**BRAVING**," that is:

- **Boundaries**: There are clear boundaries between people that need to be respected, and if they are not clear, it is okay to ask.
- **Reliability**: The famous quote of "walk the talk," what you say, you do.
- **Accountability**: If there is a mistake, the person should own it, apologize and make amends.
- **Vault**: Like a vault, anyone opens to everybody things that do not belong to them.
- **Integrity**: Courage over comfort, right over easy, putting values in practice.
- **Non-judgment**: There are no silly questions. Everybody is open to speak-up that it will be okay.
- **Generosity**: Always extend the most generous interpretation possible to intentions, words, and actions.

Leaders that effectively build trust, show vulnerability, and understand the

importance of psychological safety, are easily capable of enabling teams to be more innovative, building a moment called "Learning Zone," where the is high safety and motivation. This transformational leadership is strongly related to job satisfaction, motivation, organizational commit and effort (Anderson *et al.* 2017).

FIGURE 7: TEAM'S ZONES, THE RELATIONSHIP BETWEEN PSYCHOLOGICAL SAFETY AND MOTIVATION & ACCOUNTABILITY

Reflection

Interpreting teams' feedback, collected after each project delivery, any of the teams have stuck into a storming phase. The team quickly moved from a dependency and inclusion situation into a trust and structure stage after aligning roles and structure with the support of the team canvas. By the end of the delivery, the team became safe enough to criticize the delivery done.

An essential aspect for the teams to feel psychologically safe was that each client brief was perceived as a learning problem instead of an execution problem. It enabled the team to experiment with different leadership styles and methodologies and quickly get into the learning zone (Edmondson 2014).

During the development of one of the client's pitches, the team faced some moments of conflict due to time pressure to implement feedback from mentors. So the team was comfortable enough to speak up about the problems and quickly converge to a solution and align again. The lesson learned from this moment was about the expected state of mind.

Simultaneously, some team members were trying to filter ideas and converge, and others were generating more ideas.

Alejandro Masferrer highlights the importance of defining the expected state of mind beforehand, during design thinking sessions, or meetings in general, so the participants can prepare themselves to behave accordingly, increasing the team effectiveness (Masferrer 2019). The author defines five unique patterns:

- **Circle**: The team must reflect on the problem, share and discuss it, and avoid leaving someone behind.
- **Square**: The team is more analytical to define, conclude, and set up criteria.
- **Open Triangle**: The team must be proactive and generate as many ideas as possible. Any comment or ideas should not receive judgment and negativity.
- **Close Triangle**: The team filters ideas generated, where the ideas should not be taken personally and must adhere to the previously defined criteria.
- **Star**: Moment of motivation, inspiration, and activating the team's energy, where the team would adopt a positive attitude to offer emotional relief and inspire the team.

Team termination and reflection moments were essential to understanding how our behavior in each project was. The most important was thinking about how we were feeling in those moments, following Gibb's reflective cycle in a way that we could always apply the learnings in the next workgroup.

Providing feedback as "I-Messages", from the non-violent communication framework, helped the team provide nonviolent messages and do not take things personally (Imbo 2020). Providing concise feedback helped the team members to relate to it easily. According to the Neural Leadership Institute (Rock, 2018), if a team value or message has a duration of six seconds maximum, our brain can easily remember it using our echoic memory (Kinukawa, 2019).

This research proposes a canvas, based on the team canvas, that will help teams struggling with conflicts and counter-dependency to find constructive ways of managing them, based on the literature and previous experiences.

The Team Autonomy Canvas

The canvas consists of 7 sections with essential topics to be discussed by the team. During the session, participants should be generous with their words

and attitudes and always looking from the "I" perspective to make it a safe space for discussion.

There is also a recommendation to erase the board after the execution following the vault principle (Brown, 2018), avoiding that others would share personal boundaries with external stakeholders.

The sections are:
- **Team purpose**: The reason for this team to exists.
- **People & Roles**: To identify the team members and their roles
- **Boundaries**: What is okay and not okay for each team member according to themselves? Setting the boundary is necessary and suggested to create compassion.
- **Values**: Each of the team members' most important values, maximum of two, so that it is possible to take action on top of it.
- **Feelings**: How do the team members feel when they say they are part of this specific team? It brings to the discussion how each team member thinks about the team from an outside perspective.
- **Values in action**: Looking from the "I" perspective, how can each one, based on the previous values, contribute to help the team to increase its effectiveness.
- **Rituals**: As rituals have been shown as an essential method to align team members and create empathy, this section aligns team rituals that will help the team improve alignment and decision-making to improve autonomy.

In figure 8, there is the developed team canvas, and also, in figure 9, an example of how the canvas could be used. For future work, would be valuable to properly evaluate the canvas effectiveness testing a test/control group setting and evaluating if the team stage moved to the expected direction.

The Autonomy Canvas

Important topics to be discussed to encourage the team to move away from counter-dependency, decision conflicts and to be perceived as a team not a group of individuals. Please, during the session be generous with your words and attitudes and always look from the I perspective, help to make this space a safe-space. After the session, take your notes and burn this paper! Based on theteamcanvas.com

Team Name _____

Version: 1.0 | English

Date _____

Dênis Araújo da Silva | Masters Digital Management | Hyper Island

People & Roles
What are our names and the roles we have in the team?

Boundaries
What is OK and NOT Okay for us as individuals?

Team Purpose
What is this team purpose in the organization, school or in the world?

Values
What is our personal values?
Please maximum of 2 per person.

Feelings
What do you feel when you say that you are part of this team?

Rituals
What are the rituals that we can define in our team to help alignment and decision making in order to improve autonomy?

Values in Action
Take your values and think how could you based on your values contribute to this team to go beyond the current status?

FIGURE 8: THE AUTONOMY CANVAS, PROPOSED CANVAS DEVELOPED BY THE AUTHOR

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The Autonomy Canvas

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Team Name _____   Version: 1.0 | English

Dénis Araújo da Silva | Masters Digital Management | Hyper Island

Super Team   Date _____   24.4.2020

People & Roles
What are our names and the roles we have in the team?

- Dénis Developer
- Jessy Developer
- Mark Product Owner
- Katy Scrum Master

Boundaries
What is OK and NOT Okay for us as individuals?

- Overtime during weekends is NOT OK
- Meetings before 8 AM is not OK
- Fingerpointing is not OK!
- Consecutives sprints not 100% finished
- Early morning meetings to me is OK
- Working late "some" days is OK
- Being called during the night is not OK
- Early meetings is OK
- Lack of respect is not OK

Team Purpose
What is this team purpose in the organization, school or in the world?

- Develop the best apps from the World
- Give back to nature
- Contribute with Science

Values
What is our personal values? Please maximum of 2 per person.

- Mastery
- Respect
- Family
- Diversity
- Respect
- Respect
- Hard working
- Passion for what I do

Feelings
What do you feel when you say that you are part of this team?

- Alone
- We need to align on our goal
- That we could do more
- Scared, as the most junior of a team of senior members
- Lucky to be part of this group of brilliant professionals

Rituals
What are the rituals that we can define in our team to help alignment and decision making in order to improve autonomy?

- Slack channel for appreciation moments
- bi-weekly retrospectives
- Friday "FIKA"s
- Daily Check-in @ 9AM
- Daily Check-out @ 5:30 PM

Values in Action
Take your values and think how could you based on your values contribute to this team to go beyond the current status?

- I can book some time for chatting and knowing more about my colleagues
- I can stop doing meeting early morning
- I can start working on tasks that are out of my comfort zone so I can learn more
- I can try to remember the team of our team purpose during the meetings

FIGURE 9: EXAMPLE USAGE OF THE AUTONOMY CANVAS

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Figures

1. The Walnut model extracted from Foundation Days Module presentation, 2020
2. Process and Content from a successful project, source: https://blog.methodkit.com/the-walnut-explains-how-you-as-a-group-functions-c10f1c67eb69
3. Process and Content from a non-successful project, source: https://blog.methodkit.com/the-walnut-explains-how-you-as-a-group-functions-c10f1c67eb69
4. Gartner's mapping on project methodology, source: https://www.digi-corp.com/blog/understanding-how-design-thinking-lean-and-agile-work-together/
5. Dr. Susan Wheelan's integrative model of group development, extracted from Foundation Days Module presentation, 2020.
6. Relation between team stages, effectiveness and performance impact, extracted from Foundation Days Module presentation, 2020.
7. Team's Zones, the relationship between psychological safety and motivation & accountability, source: https://www.ncabgroup.com/blog/how-to-create-a-learning-organization/
8. Autonomy Canvas developed by the author
9. Example usage of the autonomy canvas developed by the author and used in a Miro Board (miro.com)