

### w3.1- Importance of Teams

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## Teams outperform Individuals when...

- The task **is complex**
- Creativity is essential
- The direction is unclear
- Efficient use of resources is required
- Fast learning is needed
- There is a need for strong commitment
- Implementation will require cooperation
- Members have stake in outcome
- Task is cross-functional
- No individual can succeed alone

teams perform better  
than individuals.

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# Teams can accomplish...

- Reduce lead time
- Decrease cycle time
- Cut service errors
- Manage processes
- Perform daily work
- Increase rate of transaction
- Develop new products or service
- Operate organizational units
- Simplify systems
- Understand customer needs

The things listed here that teams can

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# What is a Team?

- Definition: A group of people *working together* to achieve a **common purpose** for which they hold themselves *mutually accountable*.
- Key elements:
  - Members share in the product of the team
  - The tasks are interdependent
  - There is shared responsibility**
  - A common purpose**
  - Relationships are across organizational boundaries

A team is a group of people working together to

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## WHAT TEAMS NEED: *Clearly Defined Goals*

- **Need to understand what & why**
- Need clear link to larger vision, goal, strategy
- Must give sense of value & commitment
- Must understand link to other areas, teams
- Needs details of how work will proceed
- Needs measures to self evaluate work
- Must have common values, ethics for trust & empowerment

But teams do not automatically succeed.

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## WHAT TEAMS NEED

### *Clearly Defined Boundaries*

- Goals must be focused
- Goals must be within teams authority (or will cause frustration and possible failure)
- Must know limits on time, money, & authority
- Need to know how & when to communicate within larger organization

teams need clear boundaries.

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## WHAT TEAMS NEED

*Access to People & Resources*

- Need members with **necessary skills & knowledge**
- Access to people with diverse talents & points of view
- Access to available data & technology
- Need fast responses to requests for help

be able to access available resources readily.

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## TEAMS & CHANGE

### *The “Laws” of Organizational Change*

- People resist being changed (***so involve them to create ownership***)
- Take the time to understand the history behind the problem
- ***Avoid “tampering”*** with apparent solutions before fully studying causes
- *Pay attention to the people* (as well as the “things” or systems)

**It's natural for individuals to resist change.**

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## IMPLEMENTING CHANGE

### *Understanding Stakeholders*

- *Identify how much change will affect people & areas of the organization*
- *Understand affected people's attitudes toward the change and compare to needs*
  - Identify those affected by change
  - Define how to bring them to commitment***
  - Set priorities & how to communicate them
- ***Understand potential reasons to resist***

The people we need to understand

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## 👉 Key Role and Definition of Teams

- **Teams are Essential:** Nearly all quality improvement work, including **Lean and Six Sigma**, is **performed by teams**, as individuals often cannot accomplish the necessary goals or would take too long.
- **Benefits of Collaboration:** Teams allow individuals to **collaborate** and combine their **different skills, abilities, and knowledge**, overcoming the limitations of any single person.
- **Definition:** A team is defined as a **group of people working together to achieve a common purpose** for which they hold themselves **mutually accountable**.
- **Shared Responsibility:** Important decisions are often made by the group, not an individual. **Successes and failures** belong to everyone, not just the leader, and the work is **interdependent**.

## ★ Characteristics of High-Performing Teams

- **Cross-Functional:** Many teams are **cross-functional**, working across organizational boundaries. This helps members understand the organization as a whole and build internal connections.
- **Ownership and Commitment:** Involving individuals in solving a problem or improving a process helps them develop a **sense of ownership**, which overcomes natural resistance to change.
- **Focus on People:** While efforts may target machines or processes, it's crucial to pay attention to the **people involved**. Genuine **commitment and support** from people are necessary for the team's success.

## Necessities for Team Success

Teams **do not automatically succeed** and require the right support, environment, and structure:

- **Clarity of Purpose:** Teams must **understand what they are trying to accomplish and why** it links to the organization's bigger issues.
- **Structure and Measures:** They need **structure and metrics** for self-evaluation, often established in the initial meetings along with common values and ground rules.
- **Clear Boundaries:** Teams need to know their **scope of authority**, project limits, and **available resources**.
- **Resource Access:** They must be able to **readily access resources**, including helpful people and leaders who can **remove barriers**.
- **Understand the Problem:** Teams must take time to **understand the history of a problem** instead of jumping quickly to solutions. Constantly changing a process introduces variation and makes improvement a "moving target."
- **Stakeholder Engagement:** It is vital to understand all **stakeholders** (anyone affected by the changes, positively or negatively). Teams should brainstorm who they are, listen to their concerns, and relay information to them.

## w3.2- Types of Teams

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# Leadership Teams

- **Organizational Leadership**
- Quality Leadership

High performing organizations  
have leaders who work in teams!

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# Problem Solving Teams

- Most common
- Temporary
- Departmental
- Cross-Functional
- Scientific Method



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# Project Teams

- Are temporary
- Are special focus
- Have “Core” members (active throughout)
- Have “affiliate” members (for certain phase)
- EXs: improvement teams, product development team, etc.



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## Natural Work Teams

- Permanent or at least longstanding
- A “natural work team” in a given work area
- A “process management team” monitors & controls a work process
- A “management team” if interdependent functions so **must coordinate efforts**



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# Self-Managed Teams

- An extension of natural work teams
- Make many management decisions



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## TYPES OF TEAMS

### *Virtual Teams*

- Use technology to communicate (more than face-to-face)
- Crosses “boundaries” to interact
- **Need to spend time together to become team**
- Must develop shared goals (especially here)
- Must develop skills to communicate (especially with virtual teams)
- Must develop leadership (especially here)

The boundaries that they cross  
tend to be geographical.



## Types of Teams in Organizations

### 1. Leadership Teams

- **Function:** Leaders who work in teams to handle **planning and analysis** for both day-to-day and **strategic issues**.
- **Structure:** Often have multiple sub-teams to address specific issues. The **Quality Leadership Team** frequently includes a **steering committee** to select major improvement projects and monitor their progress.

### 2. Problem-Solving Teams

- **Function:** Created to **reactively solve a specific problem**. They typically disband once the issue is resolved or remain active to address a sequence of problems.
- **Characteristics:** Can be departmental or **cross-functional**. They **collect and analyze data** to find solutions.

### 3. Project Teams

- **Function:** Created to **proactively accomplish an improvement** or other important objective. They are usually focused on a single objective and are **almost always temporary**.
- **Structure:** Typically have **four to eight regular** or **core members**, and may include affiliate or ad hoc members for specialized skills when needed.
- **Key Difference from Problem-Solving:** Problem-solving teams are *reactive* to a failure; project teams are *proactive* for improvement.

#### 4. Natural Work Teams

- **Function:** Teams of people who **work together on a daily basis**, often in the same physical work area.
- **Characteristics:** In high-performance environments, the team mentality is actively cultivated. In sophisticated organizations, these teams take on some **responsibilities that were traditionally managerial**.
- **Self-Managed/Self-Directed Teams:** These are a **highly trained extension of natural work teams with much more authority**. They make decisions about production, work schedules, material ordering, and improvements, and in some cases, even **hire and fire** members.

## 5. Virtual Teams

- **Function:** Teams whose members are geographically dispersed and **communicate primarily through technology**, rarely seeing each other.
- **Characteristics:** Increasingly common, especially in large global companies (e.g., virtual engineering teams). They allow for **24-hour project work** through hand-offs but face challenges related to **physical distance, language, and cultural differences**.

### w3.3- Stages of Team Development

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to  
6-3

# Team Dynamics

- Teams must face issues not often spoken about, but common to all teams. These issues include
  - Personal identity in the team
    - Membership, inclusion
    - Influence, control, mutual trust
    - Getting along, mutual loyalty
  - Relationships among Team Members
  - Identify with the organization

Benefits the individual members include greater understanding of their work and

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# Stages of Team Growth

- Forming
- Storming
- Norming
- Performing
- Adjourning

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# Forming

- Forming includes these feelings:
  - Pride in being chosen
  - Excitement, anticipation, optimism
  - Initial, tentative attachment to team
  - Suspicion, fear, anxiety



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Every team goes through these stages and it's useful to understand them.

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# Storming

- Storming includes these feelings:
  - Frustration and resistance to tasks and different work methods
  - Sharp fluctuations in attitude
  - Anxiety about or withdrawal from conflict



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As team members complain about  
organization or barriers to success.



# Storming, cont.

- Storming includes these behaviors:
  - Arguing among members
  - Defensiveness and competition
  - **Questioning the wisdom** of those who selected project and appointed members
  - Establishing unrealistic goals
  - Perceived “pecking order”; increasing tension
  - Withdrawing—literally dropping out of team or withdrawing psychologically

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The storming phase often brings  
out some negative behaviors.



# Norming

- Norming includes these feelings:
  - Sense of cohesion, common spirit and goals
  - Acceptance of team membership
  - Relief—everything is going to work out



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In the norming phase,  
the team is starting to come together and



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# Norming, cont.

- Norming includes these behaviors:
  - Laughter, joking and attempts to achieve harmony
  - Experimenting with ways to **raise and discuss differences** of opinions effectively
  - Confiding in each other**
  - Expressing criticism constructively
  - Maintaining team ground rules and boundaries

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**The norming phase might be identified by the emergence of positive behaviors.**

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# Performing

- Performing includes these feelings:
  - Insights into personal and group processes
  - Understanding each other's strengths and weaknesses
  - Satisfaction at team's progress
  - Close attachment to the team

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The last major stage of  
development is performing.



# Performing, cont.

- Performing includes these behaviors:
  - Creating constructive self-change
  - Preventing or working through group problems



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The behaviors in the performing  
stage are largely positive.



# Adjourning

- Reflection
- Celebration

The project is over and  
the team will disband.



## 5 Stages of Team Development

Stage	Key Characteristics	Team Dynamics & Needs
1. Forming	The initial stage where members may be <b>eager, anxious, or confused</b> . They lack clarity on the task and don't know each other well.	<b>Unproductive.</b> Members explore behavioral boundaries and try to define the task. Communication is often directed to the leader. Team members are usually <b>told what to do</b> .
2. Storming	The <b>most difficult stage</b> , marked by <b>conflict</b> and competition. Members gain confidence to voice opinions, leading to questioning of the project, team, and each other.	<b>Frustrating</b> for everyone. Members may <b>vie for influence</b> or withdraw. Good <b>facilitation skills</b> and interpersonal communication training are crucial to manage this conflict.
3. Norming	The team begins to <b>come together</b> and work as a unit. A <b>team identity</b> and feelings of membership emerge.	Members are more relaxed, <b>resolve differences without escalating to conflict</b> , and follow team rules. They can offer and receive <b>constructive criticism</b> . Focus shifts toward team objectives.
4. Performing	The team has <b>matured</b> and works <b>smoothly and in concert</b> . Members acknowledge and <b>value each other's strengths</b> and weaknesses.	<b>Highly productive.</b> Individuals exhibit growth, and the team prevents or effectively works through problems and conflict. Satisfaction with accomplishments is strong.
5. Adjourning	The final stage when the project is <b>over and the team disbands</b> .	A time for <b>individual and team reflection</b> through a final debriefing (e.g., what went well, what was learned). <b>Public celebration</b> of the team's good work is important for recognition and to encourage others to join future teams.



## Benefits of Teamwork for Individuals

Successfully managed teams that progress through these stages offer several benefits to individual members:

- **Greater Understanding** of their work and the organization.
- **Improved Relationships** with colleagues.
- Increased **Satisfaction and Engagement** from solving real problems.

## w3.4- Brainstorming

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# Purpose

- The purpose of brainstorming is to collect as many ideas as possible
- Generally, a group can come up with many more ideas than an individual
- Several of the other tools, like cause and effect, and Why, Why, Why are specialized brainstorming tools

The purpose in a brainstorm session is to generate lots of ideas.

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# When to use

- Use whenever the group needs to generate ideas
  - To begin the problem statement
  - To identify containment action
  - To identify root cause
  - To identify corrective action
- Brainstorming only generates ideas. There are other tools for selecting them.

Use brainstorming whenever you need to generate ideas.

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# How to use - Guidelines

- Define the Topic
- No evaluation.
  - Accept all ideas, do not debate their merits
- Encourage wild ideas.
  - They might spark something
- Build on Ideas of others.
  - The best ideas may be a combined effort
- Strive for quantity.
  - We want a lot of ideas.  
We can sort out the good ones later



# How to use - Types

- Free wheeling
  - Everyone shouts out ideas and one or two scribes record
- Round robin
  - Go around the table and take turns – this can encourage some who hesitate to participate
- Slip method
  - Write ideas down and pass them to a scribe.  
This helps people who do not want to speak up,  
but it is harder to build on ideas.

Everyone just shouts out their ideas.



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# Brainstorming Tips

- Experienced facilitator
- More than one Scribe
- Record ideas verbatim
- Confirm understanding
- Reduction
- Team decision making tools

These are some tips for successful brainstorming.



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# Conclusion

- Brainstorming is **one of the more** commonly used tools
- It is often done informally, but it is good practice to review the rules before you start
- The hardest part is **to refrain from evaluating ideas** as you go

Most teams use brainstorming frequently,



## Purpose and Rules of Brainstorming

### When to Use Brainstorming

Brainstorming is useful whenever a team needs to generate ideas, such as:

- Developing a **problem statement**.
- Identifying **root causes** (like with Cause and Effect diagrams).
- Determining **corrective actions** or improvement ideas.

### The Most Important Rule

- **No Evaluation:** The most crucial and difficult rule is to enforce **no evaluation** of ideas—not even positive feedback like "good idea."
  - This encourages **wild ideas**, which might trigger more useful ideas from others or not be so "wild" upon later examination.
  - The objective is **quantity** to allow team members to **build on each other's ideas**.

### Before Starting

- **Clearly Define the Purpose:** Define the topic so participants understand the focus.
- Allow participants a few minutes to **think about the topic** before starting the session.



## Types of Brainstorming

Method	Description	Pros	Cons
Free Wheeling	Everyone <b>shouts out their ideas</b> spontaneously.	Creates <b>energy and excitement.</b>	Can be dominated by a few members; quieter members may be hesitant.
Round Robin	Participants <b>take turns</b> sharing their ideas sequentially.	Prevents <b>domination</b> by one person.	May lose some energy and opportunities for spontaneous idea-building.
Slip Method	Participants <b>write down their ideas</b> and pass them to a scribe.	Helps <b>quieter members</b> contribute and can cater to people who prefer thinking in quiet.	May lose some energy and opportunities for spontaneous idea-building.

## Tips for Successful Brainstorming

1. **Use an Experienced Facilitator:** If possible, use a facilitator who is **not a participant** in the session. They can enforce the **no evaluation** rule, prevent domination, and draw out hesitant members.
2. **Use More Than One Scribe:** Ideas often come faster than **one person can record**. Using two scribes and two **flip charts** allows one to write while the other takes the next idea, **preventing a drain on energy**.
3. **Record Ideas Exactly:** Scribes must record ideas **exactly as stated** to avoid interpretation that could change the meaning.
4. **Confirm Accuracy:** When the session slows, scribes should go through the list to confirm accuracy with the participants.
5. **Transition to Selection:** Ideally, **immediately use other tools** in the same session to reduce and select the best ideas.

## w3.5- Team Decision-Making

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# Nominal Group Technique

- Identify topic or problem
- Silent idea generation
- Ideas presented in sequence
- Clarification and evaluation
- Decision

Nominal Group Technique is similar to the slip method of brainstorming that we

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# Affinity Diagram

- Write ideas **on a sticky note**
- Stick notes on a white board
- Arrange into natural groups
- Label groups

Affinity diagrams are another silent technique.

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# List Reduction

- Brainstorm list
- Combine
- Set aside
- Use decision making tools

When you've completed a brainstorm and have a list of ideas,

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# Decision Making

- Prioritization
  - Reduced list
  - Rank Order
  - Sum
  - Discuss
  - Select

One of the decision making tools is prioritization,



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# Decision Making

- Multivoting
  - Reduced list
  - Allot votes
  - Vote
  - Sum
  - Discuss
  - Repeat

In multivoting, each team member gets multiple votes, usually five, but

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# Team Decision Making

- Sequence
- Options

For team decision making, we usually go through a sequence where we generate

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## Advanced Brainstorming & Idea Reduction

### 1. Nominal Group Technique (NGT)

- **Goal:** Structured brainstorming that ensures **quiet idea generation** and equal participation.
- **Process:**
  1. **Define** the topic/problem.
  2. Participants **quietly write down** their ideas (5-10 minutes).
  3. The facilitator asks for **one idea from each person in sequence** and records them (no discussion or evaluation allowed).
  4. The group then discusses the ideas for **clarification and evaluation**.
  5. A final selection is made using team **decision-making tools**.

## 2. Affinity Diagrams

- **Goal:** Grouping a very large number of ideas, especially when the problem is poorly defined, into logical categories.
- **Process:**
  1. Participants write **one idea per Post-it Note** (5-10 minutes).
  2. All notes are placed on a board.
  3. Team members **silently rearrange** the notes into **logical groups**. (If an idea fits two groups, write a new note for the second group).
  4. The team discusses and **names/labels** each resulting group. This can reduce 50-75 ideas to 6-8 manageable groups.



## List Reduction and Selection

After the initial brainstorm, the team must **reduce the list** before making a final decision.

### List Reduction Steps

1. **Combine similar ideas**, leading to useful discussion and clarification.
2. Ask the group about removing remaining ideas. Two ways to remove ideas are:
  - Simple **voting**.
  - **No idea is removed without the consent** of the person who proposed it (to ensure that an idea the team initially doesn't see value in is preserved if the proposer feels strongly about it).
3. **Preserve all non-selected ideas** in case they become useful later.

## 1. Prioritization (Rank Ordering)

- **Goal:** To rank the top ideas numerically to guide discussion. (Start with a reduced list, e.g., 12 ideas).
- **Process:**
  1. Each participant **individually ranks their top five ideas** (1 being the best) to prevent external influence.
  2. The facilitator records the rankings next to each idea.
  3. **Add up the rankings** for each idea (the lowest sum is theoretically the highest-ranked choice).
  4. The team discusses **why** different rankings were made (the reasons).
  5. The team **agrees on the final selection**. Crucially, **the team makes the decision, not the tool**; the discussion may lead to a selection other than the lowest-ranked one.

## 2. Multivoting

- **Goal:** To quickly narrow down a list of ideas by giving participants multiple votes to distribute.
- **Process:**
  1. Start with a reduced list (e.g., 12 ideas).
  2. Each team member receives **multiple votes** (e.g., five).
  3. Participants can **apply their votes any way they wish**: one vote for their top five ideas, or all five votes on a single idea they feel strongly about, or anything in between.
  4. Record and **add all the votes**.
  5. The team discusses the voting results and reasons.
  6. If the decision is unclear, remove ideas with no or few votes, and **vote again**.

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The final reminder is key: **do not let the tool exclusively determine the decision; the decision belongs to the team.**

## w3.6- Agendas, Minutes, and Status Reports

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# Managing Meetings

- Purpose
- Agenda
- Minutes
- Status Reports



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# Managing Meetings

- Roles
  - Meeting Leader
  - Facilitator
  - Time Keeper
  - Scribe



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# Agenda Template

<b>Agenda for:</b>		<b>Meeting Purpose:</b>		
Date:	Time: <i>From:</i>	<i>to:</i>	<b>Location:</b>	
<b>Team Members:</b>				
<b>Guests:</b>				
<b>Leader:</b>	<b>Time Keeper:</b>		<b>Scribe:</b>	
<b>Agenda Topics</b>	<b>Allotted Time</b>	<b>Resolution</b>	<b>Responsible:</b>	<b>Due Date:</b>
<b>Remarks:</b>				
<b>Remarks:</b>				
<b>Remarks:</b>				
<b>Remarks:</b>				
<b>Remarks:</b>				

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# Preparing the Agenda

Why would you like to achieve your goal

Agenda for: Six Sigma Team 1	Meeting Purpose:	Develop Team Charter		
Date: 1/30/2017	Time: From: 10:00 AM to: 11:00 AM	Location: Meeting Room 1A		
Team Members: Member #1, Member #2, Member #3, Member #4, etc.				
Guests: Project Sponsor				
Leader: Team Leader	Time Keeper: Member #1	Scribe: Member #2		
Agenda Topics	Allotted Time	Resolution	Responsible:	Due Date:
Remarks:				
Remarks:				
Remarks:				
Remarks:				
Remarks:				

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# Preparing the Agenda

<b>Agenda for:</b> Six Sigma Team 1	<b>Meeting Purpose:</b> Develop Team Charter			
<b>Date:</b> 1/30/2017	<b>Time: From:</b> 10:00 AM <b>to:</b> 11:00 AM	<b>Location:</b> Meeting Room 1A		
<b>Team Members:</b> Member #1, Member #2, Member #3, Member #4, etc.				
<b>Guests:</b> Project Sponsor				
<b>Leader:</b> Team Leader	<b>Time Keeper:</b> Member #1	<b>Scribe:</b> Member #2		
<b>Agenda Topics</b>	<b>Allotted Time</b>	<b>Resolution</b>	<b>Responsible:</b>	<b>Due Date:</b>
Topic #1	10 minutes			
Remarks:				
Topic #2	5 minutes			
Remarks:				
Topic #3	20 minutes			
Remarks:				
Topic #4	20 minutes			
Remarks:				
Topic #5	5 minutes			
Remarks:				

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w3.6- Agendas, Minutes, and Status Reports.mp4

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# Using the Agenda

<b>Agenda for:</b> Six Sigma Team 1		<b>Meeting Purpose:</b> Develop Team Charter		
Date: 1/30/2017	Time: <b>From:</b> 10:00 AM	<b>To:</b> 11:00 AM	<b>Location:</b> Meeting Room 1A	
<b>Team Members:</b> Member #1, Member #2, Member #3, Member #4, etc. <b>Attended</b>				
<b>Guests:</b> Project Sponsor				
<b>Leader:</b> Team Leader	<b>Time Keeper:</b> Member #1		<b>Scribe:</b> Member #2	
Agenda Topics	Allotted Time	Resolution	Responsible:	Due Date:
Topic #1	10 minutes	Gather data	Fred Smith	2/15/2017
Remarks: <i>Fred will lead a sub-team to gather data on this item.</i>				
Topic #2	5 minutes			
Remarks:				
Topic #3	20 minutes			
Remarks:				
Topic #4	20 minutes			
Remarks:				
Topic #5	5 minutes			
Remarks:				

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# Using the Agenda

<b>Minutes for:</b> Six Sigma Team 1	<b>Meeting Purpose:</b> Develop Team Charter			
<b>Date:</b> 1/30/2017	<b>Time: From:</b> 10:00 AM	<b>to:</b> 11:00 AM	<b>Location:</b> Meeting Room 1A	
<b>Team Members:</b> Member #1, Member #2, Member #3, Member #4, etc. Attended				
<b>Guests:</b> Project Sponsor				
<b>Leader:</b> Team Leader	<b>Time Keeper:</b> Member #1	<b>Scribe:</b> Member #2		
<b>Agenda Topics</b>	<b>Allotted Time</b>	<b>Resolution</b>	<b>Responsible:</b>	<b>Due Date:</b>
Topic #1	10 minutes	Gather data	Fred Smith	2/15/2017
Remarks: Fred will lead a sub-team to gather data on this item.				
Topic #2	5 minutes	Talk to finance	Jane Smith	2/7/2017
Remarks: We need more information from someone in finance				
Topic #3	20 minutes	Problem statement		
Remarks: The team agreed on a problem statement. No further action needed				
Topic #4	20 minutes	Goals		
Remarks: The team agreed on rough goals, but no further action until we get info from finance.				
Topic #5	5 minutes	Agenda Items	Scribe	2/7/2017
Remarks: The team discussed and agreed on agenda items for the next meeting.				

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# Status Reports

- Project title
- Person preparing report
- Distribution list
- Original completion date
- Projected completion date
- Current budget
- Anticipate budget
- Accomplishments
- Risks
- Mitigation



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The **agenda** is a list of items to be discussed or acted upon at a formal meeting. It serves as a roadmap for the event, ensuring that time is used effectively and that all necessary topics are covered.

## Key Functions of an Agenda

Function	Description
<b>Structure</b>	It provides the <b>framework</b> for the meeting, listing topics in a logical order (e.g., introductions, old business, new business, wrap-up).
<b>Preparation</b>	It allows participants to <b>prepare in advance</b> by knowing exactly what will be discussed, leading to more informed and productive contributions.
<b>Time Management</b>	A well-structured agenda often includes <b>time allocations</b> for each topic, helping the meeting facilitator keep the discussion on schedule.
<b>Focus &amp; Scope</b>	It ensures the discussion <b>stays on track</b> and prevents the group from drifting into irrelevant topics, maintaining the meeting's overall <b>purpose</b> .

In essence, the agenda outlines **what** will happen, **when** it will happen, and often **who** is responsible for leading the discussion on each point.



## Key Tools and Elements for Effective Meetings

The presentation details several core elements necessary for successful meetings:

### 1. Basic Elements

- **Purpose:** Every meeting must have a **specific, identified purpose** (What do you hope to accomplish?). If there is no purpose, the meeting should not happen.
- **Agenda:** A **written agenda** should be created and distributed **well before** the meeting to inform attendees of the discussion topics and expected decisions.
- **Minutes:** **Minutes** must be distributed after the meeting to reinforce decisions and clarify who is responsible for **action items**.

## 2. Meeting Roles and Responsibilities

To maintain focus and structure, specific roles should be designated for each meeting:

Role	Responsibility
Meeting Leader	Defines the purpose, guides the discussion, and ensures the meeting stays on topic.
Facilitator	Helps keep the team on task and manage group dynamics (especially helpful in early stages).
Timekeeper	Monitors the time allotted for each agenda item and reminds the leader when time is running out.
Scribe	Prepares the agenda (with the leader) records decisions and action items, and distributes the minutes.

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**Note:** Roles may be rotated later in the team's development (performing stage) for cross-training and skill development.



## The Agenda & Minutes Template

The presentation suggests using a standard template to simplify the meeting process:

- **Top of Form:** Fill in the team name, **purpose** of the meeting, date, start/end times, location, and the names of all team members and expected guests.
- **Assign Roles:** Clearly assign the leader, timekeeper, scribe, and facilitator.
- **Bottom of Form (Topics):** List the specific topics, assign a **realistic amount of time** to each, and consider arranging them in order of importance.
- **Meeting Execution:** The agenda can **be projected** during the meeting to clearly record decisions as they are made. The timekeeper enforces the time limits, only allowing extensions if the entire team agrees.
- **Creating Minutes:** After the meeting, simply change the word "Agenda" to "Minutes" on the form, and the scribe distributes it immediately, including all new guests and stakeholders.

## Status Reports

The final communication tool mentioned is the **Status Report**.

- These reports are periodically required by sponsors or steering committees.
- They can be easily prepared using information drawn from **the meeting minutes** and the results from the team's use of **quality tools**.
- It's important to communicate the team's **process** as well as its **results**.

The overall message is that **a structured and organized approach to communication** using these basic tools is crucial for team success.

Here's a side-by-side comparison:

Feature	Goal (Ziel)	Purpose (Zweck/Absicht)
What it is	A <b>specific, measurable outcome</b> you plan to achieve.	The <b>fundamental reason</b> for an organization's or project's existence.
Focus	<b>Destination.</b> It focuses on <i>what</i> you want to accomplish.	<b>Motivation/Why.</b> It focuses on <i>why</i> you are doing the work.
Time Frame	Often <b>short- or medium-term</b> and can be achieved.	<b>Long-term, enduring</b> , and often aspirational.
Example	<b>Goal:</b> "Increase customer satisfaction ratings by 10% this quarter."	<b>Purpose:</b> "To provide exceptional customer experiences."
Function	Goals are the <b>steps or benchmarks</b> you use to fulfill your purpose.	The purpose <b>guides the creation</b> and pursuit of all goals.

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In short, the **purpose** is the overall "why," while **goals** are the specific, actionable "what" and "when" that help you realize that purpose.