Teams Start Up and Development Guide

The purpose of this guide is to help new teams and intact teams develop ways to work together effectively. This guide is for newly formed teams to use to get organized around their work *and* for intact teams that want to revisit how they are organized or incorporate new members or assignments into their work plan. For teams that are starting up, using all 10 tasks is recommended. Once you have gone through this guide and are planning to do some work redesign, you may find that you only need to go through some of the tasks – those that are the most relevant to your redesign efforts.

This guide can be used on its own or to complement work design/redesign workshops that your organization may go through. It works for teams in any kind of organization—business, government, or not for profit. It can be used by people on the shop floor, professionals, research and development specialists, managers, and project teams—anywhere people need to organize themselves to get work done.

Your team can decide the best way to use the guide. Use it in a 'do-it-yourself' way. You can start at any point, or work through it from beginning to end. Your team can complete all the tasks at one time, or set up meetings weekly to do different tasks. Find the variation that works best for your team. The important thing is to do all the tasks in the guide fully within the first month or two and then review each task regularly, making changes when necessary.

Keep in mind that team design is never really finished. Just when you think you have your team organized just right, something changes. Maybe new people join the team, or the nature of your product or service changes, or market changes lead to a different level of production requirements.

So keep this guide after you have finished going through the tasks the first time. You will need to review your progress from time to time, and the tasks that follow will serve you well into the future.

Task 1—Team Boundaries: Decisions and Tasks Belonging to Your Team

Teams need clear boundaries defining what the team can and cannot control and coordinate. Boundaries are limits to the area of responsibility of the team.

For example, there are some ‘givens’ such as organization policies, government laws and regulations, and union contract limitations that your team cannot ignore. No team can decide for itself to ignore a law or regulation, or change the specifications the customer expects to see on the product or service they are buying.

So, identifying your team’s boundaries helps you understand what decisions you can make, and which decisions need to be negotiated with management or others in the organization. Decisions may include production schedules and goals, hiring new team members, as well as assignments of team members to daily jobs.

You also need to identify tasks that belong to the team. Tasks are the work activities your team performs every day to get the product out the door or the service delivered to a customer.

Make the following lists to identify your team’s boundaries:

- Decisions and tasks completely owned by the team;
- Areas outside the team’s control, such as legal obligations, organization policy, or union contract;
- Decisions and tasks shared between the team and management, and other teams;
- Decisions the team is consulted on, but not responsible for making.

You can do this list activity with management in the room, or negotiate it with them later.

Task 2—Team Goals

Team goals answer the question, “What is the purpose of this team?” Goals keep teams focused on what’s important, the reason the team exists. Goals also help teams continue to develop and learn on the job. Without setting its own goals, no team can be self managing. There are three kinds of goals:

1. Team production or service goals that focus the team on its output
2. Team development goals that encourage the team to keep improving itself
3. Individual development goals for each team member’s professional development.

For example, here's a team production goal from a hospital human resources group:

We will process requisitions for new job postings within 24 hours of receipt.

And another team goal example from a hi-tech manufacturing workplace:

We will produce 20 computer units per day at 100% quality.

Production and service goals measure the work output of the team—the number and quality of the product or service.

Development goals measure team growth and development over time. An example of a team development goal could be:

Zero injuries on the job this quarter.

Individual goals help each team member realize their desirable future at work and help build their professional development plan. An individual goal example is:

Team member Mary will improve her leadership skills by serving as the team's contact person during the next three months.

Begin goal setting by agreeing on a few (3-6) key production or service goals for the team. Make sure each goal is specific, clear, and that it has a time and quality expectation. Negotiate these goals with management. Remember, management might have different expectations than your team. Negotiating means listening, discussing, and being ready to compromise.

Then move on to team development goals and individual goals. Remember, in the area of individual goals, the strategy is to provide each team member with a good job and a desirable future at work. But this doesn't necessarily mean anyone can do what they want. Your team needs to always balance the desires of the individual team member with the overall goals and available resources of the team.

Task 3—Team Ground Rules

Teams are most effective when they agree on ground rules for behavior.

In team meetings, for example, it may be useful to have ground rules for team meetings that keep the team focused on its task, respecting the participation of all members.

A more general team ground rule might be: Arrange for someone to cover for you when you have a scheduled day off.

This kind of ground rule can help the team manage its consistency.

Your team should pay attention to developing specific team ground rules for managing conflict among its members. In traditional workplaces, supervisors take care of conflicts and disagreements among workers. Now, a well-functioning team will encourage team members to manage their own conflict, only going to management for help with their efforts are not successful.

Be careful setting ground rules. There is a tendency sometimes to make a rule for every problem. Often rules are made to address a problem instead of dealing with the person who had the problem. Rule making can be a way of avoiding conflicts.

Use the principle of minimum critical specification as your guide. Minimum critical specification means specifying only what is essential to make your team operate effectively. Make no more rules, limitations, or procedures than absolutely necessary for the functioning of your team.

Task 4—Team Information Systems

Teams need timely, accurate feedback so they know the results of their work. Feedback is information from people, like customers, or from technologies that tell us how we did—mistakes and successes.

Feedback is timely and accurate when it comes directly to the team from the source of the problem, that part of the work process where and when the problem occurred.

Feedback and information systems allow teams to measure their own effectiveness so they know how they are performing against their production or service goals.

Teams need to develop information management systems that help them coordinate their work. Teams require open, explicit documentation of goals, methods, and responsibilities. Typically, effective teams have charts, graphs, and schedules posted publicly on walls for all to see, or on computer programs and Email.

These are some of the key questions to answer as your team develops its information plan:

- What results do you need to measure?
- What information do you need to have in order to measure results of your team's work?
- Who has this information now?
- How and in what form should this information be gathered?
- What systems or processes do you need to put into place to gather and analyze information?
- What documentation and publication methods will you use to communicate the results of your team's work? Wall charts, email, etc.

Task 5—Team Coordination

A team that is well coordinated is a team that has everything and everyone working together, aligned in the same direction, towards the accomplishment of its goals, as well as the overall goals of the organization.

A person who is coordinated is someone whose parts—mind and body—work together. We joke about some people: "He can't walk and chew gum at the same time." We say that a person who is a good coordinator is one who can keep many balls in the air at the same time—a good juggler of complex tasks and functions. It's the same with a team.

In traditional bureaucratic workplaces we depend on the supervisor to handle work coordination. In a team-based workplace, everyone takes the lead at different times in providing coordination.

Team coordination tasks might include:

- Keeping supplies flowing to the team
- Monitoring feedback systems
- Representing the team at organization meetings
- Being the point of contact between the team, other teams and the organization
- Passing important information across shifts
- Being the point of contact for the team when a member is sick or needs help

A team identifies the tasks it needs to coordinate and decides how to best make sure this coordination is done. The team may either develop coordination systems, or rotate coordinating tasks among its members, so everyone can become skilled, and so that no one person is overburdened with too much responsibility.

Here are some tasks to help your team ensure its effective coordination:

1. Identify the coordination tasks your team needs to address;
2. Decide how the team will coordinate these tasks—whether a system can be put in place, or a person should be assigned to coordinate that function;
3. Then have individual team members take the first turn at being coordinator for each task you identified.

It's important to put a time limit on how long each person will perform their coordinating task. Make it long enough so people in other parts of the organization or customers experience regularity. Make it short enough that it is not seen as a permanent position.

Task 6—Team Skill Development Plan

Teams maintain a skills matrix to track the skill development of its members, and to plan for the skill development of the team. The skills matrix is a barometer telling the team how deep and broad its skills are.

To make a skills matrix, start by identifying the essential skills and technical knowledge required to get the work of the team done. List these skills as shown in the example below. Place each team member's name across the top. Then compile a collective picture of your team's skill resources by using a simple scale:

> '0' for none of a particular skill
> One tick (√) for a sufficient level of skill
> Two ticks (√√) for high level of skill, (this person could teach the skill to others)

Example Matrix:

Essential Skills	Stephanie	Tom	Martin	Nancy	Gary
Skill A	√√	√	0	0	0
Skill B	√	√	√	√	√√
Skill C	0	√√	√√	0	√
Skill D	√	√√	0	√√	0
Skill E	√√	0	√	√	0
Etc.					

The matrix can point out team skill deficiencies and opportunities for training members so there is more back-up on the team.

Your team should use your matrix to develop a team skill development plan. Your plan specifies what training people on the team need to make sure the team meets its goals.

Consider the following questions when doing your team plan:

- What are the strengths and weaknesses of your team?
    - Where are you under skilled?
- How much back-up skill does your team require to ensure getting its work done in a way that meets your team goals?
- Who needs training in what?
    - List names of team members and the specific training they need.
- Where do you get the training?
    - Can someone on the team do it, or should you go to an outside resource? How much will it cost, and how do you pay for it?

Task 7—Managing and Improving Your Team's Work Processes

Teams own their work processes and are responsible for continuously solving problems and improving the work system.

Completing the following tasks will improve your team's work system.

1. Draw a diagram of your current work processes on chart paper so everyone has a clear understanding of how work moves through the team, from beginning to end. Work processes start with inputs to the team, like raw materials and customer orders, and end with outputs such as products or services.

2. Brainstorm the process problems that occur in your current work flow. Process problems are any deviation from a quality standard, a malfunction, delay, foul-up, breakdown, or unplanned event that has a negative impact on schedule, quality, or cost.

3. Prioritize your list of process problems, using criteria like impact on quality, cost, or customer satisfaction.

4. When you have identified the key problems, answer these questions for each one:

- What's the technical problem?
- What's the impact?
- What are the causes?
- How is the problem handled now, and by whom?
- How might the problem be solved or prevented?

5. Develop an action plan for responding to each key problem. Include: a clear description of the problem, your plan for solving or preventing it, and identification of who will work on it and when. Your plan may require fixing the problem or completely redoing the process.

Here's another way to do this activity. Instead of drawing your team's work process on paper, bring your process to life by simulating what happens step by step. This is particularly useful for teams that are made up of people coming from different parts of the process.

For example, a new team in a court system literally passed a case file around from team member to member to demonstrate what happens in the process beginning to end. Another example is a new marketing team made up of people from different functions related to marketing and sales. They had a person role play what happens to a customer as they are passed around the parts of the marketing process.

As a new team, you may find that you need to invent new work processes, or start from scratch because the old process is too broken to fix. This requires a 'clean sheet' approach in which your team maps out on chart paper each step in a new process, noting work activities and decision points along the way. You can start this process mapping by identifying the end product first. Start with the customer or stakeholder expectations for a quality product or service, then go back and identify each step to get there.

Regularly review changes and problems that occur in your team's work flow. It's the job of your team to constantly monitor and improve your process so that you can achieve your performance goals and be an effective team.

Task 8—Team Work Space and Equipment Needs

Your team may require some changes in the physical layout of your work space and additional equipment. Teams require:

- Face to face communication
- Opportunity for people to be in close physical proximity (if possible)
- A work space that has room for private work and team meetings

Do the following assessment:

1. Do a current inventory of all equipment, tools, technologies, and work spaces available to the team;
2. Brainstorm ideas for what work space and equipment to keep, get rid of, and add to make sure the team has the resources it needs;
3. Choose those work space changes and equipment needs that are the highest priorities for your team;
4. Develop cost assessments and justify resource needs.

Present your suggestions to management and negotiate for what your team needs. Remember, every other new team is doing the same task. This task requires patience and co-operation with other teams.

Task 9—Becoming an Open Systems Team

Open systems is a principle that can guide the behavior of your team. The principle says, "Any system to survive and prosper must have an open and direct relationship with its environment".

We use the term 'system' to mean any organization, community, or team that draws a boundary around itself to establish its relationship with its environment. 'Environment' means everything outside the system.

Your team is a new social system just now coming to life. Your team's environment is fast changing and demanding. Your environment includes all the other in your organization, management teams, and customers and suppliers—inside and outside your organization. Your environment is also made up of all those people and forces outside your team's larger organization that have an impact on the success of your work—competitors, government regulators, local community groups, just to name a few.

It is important that your new team stays aware of what's happening in its external environment. Your team will be successful if you develop and maintain strong positive relationships with people and groups in and outside your organization. Remember to stay aware of what's changing around you.

Step 1: External Environment Scan
Start the assessment of your external environment by scanning your team's immediate business and social environment. Brainstorm things changing in your environment. Examples might be: specific changes in organizational strategy; a new mission for your organization; a change in government regulation; social changes that affect the nature of your product or service.

Step 2: External Environment Analysis
Identify the most important changes in your environment and analyze what they mean to the success of your team. And decide what to do about them so you are contributing to the overall success of the team and the rest of the organization.

Step 3: Stakeholder Analysis
Do a stakeholder analysis. We call everyone in your team's environment stakeholders. We call them stakeholders because they have an impact on you and are important to your success. They have a stake in your future.

Start by identifying the stakeholders who are important to your team's success. Stakeholders could be people, teams, or organizations. Remember that management is also an important stakeholder for your team. Be sure to discuss your mutual expectations with them.

Answer the following questions for each stakeholder. You can do this activity with the stakeholder in the room working with you. Both you and the stakeholder will learn much about your mutual relationship.

1. What does the stakeholder provide for our team?
2. What does our team provide for the stakeholder?
3. What expectations and requirements does the stakeholder have for our team?
4. What expectations and requirements do we have for the stakeholder?
5. How are we meeting each other's expectations and requirements today?
6. How will these expectations and requirements change in the future?
7. What changes or improvements do we need to make for us to meet each other's expectations and requirements?
8. Should we be challenging each other's expectations and

requirements, and if so, how?

Step 4: Data Analysis
After interviewing all your stakeholders, take the information you have gathered and discuss what it means to your team. How does this new information affect your team goals, relationships with stakeholders, the processes you use to do your work? Make changes in your work systems to meet, and maybe even exceed, the expectations of your stakeholders.

Review these questions regularly with your important stakeholders. You will find that your team will become more effective as it develops positive working relationships with all its stakeholders.

Task 10—The Six Criteria for Productive Work

A team has a goal of providing its members with a good job. A good job is one that satisfies each person's needs to be a productive person. Over time, your team can measure its development by periodically assessing each member's satisfaction.

The following six basic human requirements must be present on your team for people to be productive. These human requirements are a foundation for designing an effective team. They are so important that we call them the six criteria for productive work. These needs are experienced to different degrees in different people. The six criteria are:

1. Elbow Room for Decision Making.
   People need to feel that they are their own bosses and that, except in exceptional circumstances, they have room to make decisions they can call their own. On the other hand, they do not need so much elbow room that they just do not know what to do.

2. Opportunity to Learn On the Job and Go On Learning.
   Learning is a basic human need and activity. Learning is possible only when people are able to:
   a. Set goals that are reasonable challenges for them, and
   b. Get feedback of results in time for them to correct their behavior.

3. Variety.
   People need to be able to vary their work to avoid the extremes of boredom and fatigue. They need to set up a satisfying rhythm of work

that provides enough variety and a reasonable challenge.

4. Mutual Support and Respect.
   People need to be able to get help and respect from their co-workers.

5. Meaningfulness.
   People need to be able to relate what they do and what they produce to their social life. Meaningfulness includes both the worth and quality of a product, and having a knowledge of the whole product. Many jobs lack meaning because workers see only such a small part of the final product that it's meaning is denied them.

   Meaningfulness has two dimensions:
   a. Socially useful, and
   b. Seeing the whole product

   Taken together, these dimensions make it possible for a person to see a real connection between their daily work and the world.

6. A Desirable Future.
   Put simply, people need a job that leads to a desirable future for themselves, not a dead end. This desirable future is not necessarily a promotion, but a career path that will continue to allow personal and professional growth and an increase in skills.

Your team can complete its own six criteria table. Construct a table on a chart paper. Put the names of your team members along the top, and the six criteria down the side. Starting with first item—elbow room—discuss how much elbow room each team member is currently experiencing in the team. Put a score down for each person. Discuss and score the rest of the six items, using the following scoring instruction.

Because the first three criteria need to be optimal for each individual, these three are scored from -5 (too little) to +5 (too much), with 0 being optimal, just right.

As the second three criteria are things you can never have too much of, they are scored from 0 (none) to 10 (lots).

The final group product will express the range of scores across the section. It is best to do this activity as a group task. Everyone in the group discusses their own scores as they see them. They share their perceptions of other's scores, discussing and negotiating differences in perceptions, changing their scores if necessary, and arriving collectively at a picture of how their team meets their needs.

Review all the scores on the table and develop a plan for improving the satisfaction levels of team members where necessary. This is a good learning activity to do every 36 months as a reality check to make sure everyone on your team has worthwhile work.

Continuous Learning and Development

Once your team completes all the start up tasks in this guide, you are well on the road to effective team-working. Remember, your team will continue to develop and evolve over the months and years ahead. The overall goal is for your organization to become increasingly successful because of the participation of its people. In the process, each member of your team strives toward their desirable future at work.

Your team's level of effectiveness will not grow by accident. It will take hard work and diligence on the part of the whole team. Keep reviewing these 10 tasks on a regular basis and making changes as you go forward. Team learning and development require a good balance of action and reflection. Get in the habit of regularly taking time out to reflect. Team reflection means to discuss what you have been learning as a team. It also means being critical and demanding of yourselves and the organization.

(Based on *People In Charge: Creating Self Managing Workplaces,* Robert Rehm, Hawthorn Press, 1999)

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