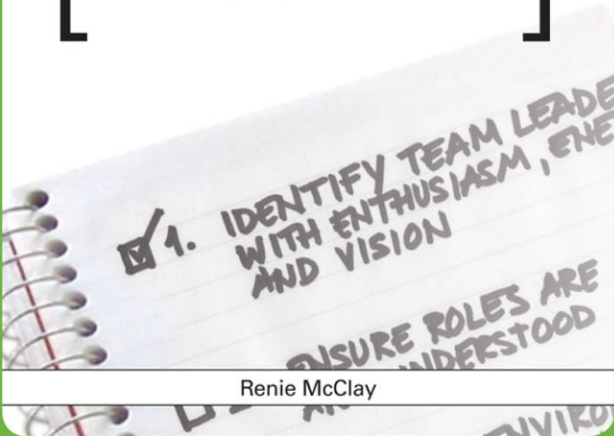


# 10 STEPS TO SUCCESSFUL

## [ Teams ]



1. IDENTIFY TEAM LEADER WITH ENTHUSIASM, ENERGY AND VISION

ENSURE ROLES ARE UNDERSTOOD

Renie McClay

An Excerpt From

***10 Steps to Successful Teams:***

by Renie McClay

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# I N T R O D U C T I O N

Teams, and work groups working together as a team, will continue to be critical to business success. The global nature of business today demands that people work well with others who are often far away and from different cultures. This adds a new dimension for many managers and leaders as well as for many team members.

Teams need to be able to connect with each other quickly as teammates determine what needs to be done, identify obstacles and overcome them, and meet deadlines and goals. Positive collaboration becomes an important part of the team's work.

Coming from a background in sales and having experience with several *Fortune* 500 companies, I have worked on some truly remarkable teams. My favorite were teams in which people became friends and worked through problems. In these environments we helped each other out and were very goal focused. No one harbored hidden agendas, or if someone did, the team called him or her on it.

I have gathered the teachings of seasoned colleagues who have been successful at working in team environments and incorporated them here so that you can benefit from their lessons learned and apply them to your own teams—whether you are leading a team or participating on one.

## What You'll Find in This Book

This book was written for both team leaders and team members. Each step has content and specific tips intended for both audiences. This is no accident. Team leaders must lead transparently so

the team members know exactly what is happening. But great teams are composed of both effective leaders and effective team members. This book can be used by team members individually or by the entire team as a team-building and developmental tool. There are assessments, tips, and tools included for both audiences.

You will find this book to be a short and sweet resource on the topic of successful teams. It is not an exhaustive study of teams; rather, it is meant to be a quick read with steps that are easily implemented and contain the essential keys to team success. You can read it as 10 steps that build on each other or you can go directly to the step that interests you and solves today's problem.

Here are the 10 steps that I believe are necessary to build successful teams:

**Step 1: Identify Team Leaders with Enthusiasm, Energy, and Vision**—Creating the team is perhaps the single most important step in the process. If the team doesn't possess the right skills and drive to accomplish the goals, then the work will be painful and often unsuccessful. The right leader can either help or hinder the process.

**Step 2: Ensure Roles Are Clarified and Understood**—If team member roles are not clear, one of two things will happen. The team will be inefficient because time will be wasted as more than one person does the same thing. Or, the team will be ineffective, because something important won't get done at all. Clarifying who is responsible for what is critical up front.

**Step 3: Create an Environment to Encourage Communication**—Healthy and effective communication builds trust. Giving positive and constructive feedback helps to keep things on track and eliminate errors. Managing conflict helps a team focus on the goal rather than on interpersonal dynamics that can slow things down and deteriorate the morale of the team.

**Step 4: Build Strong and Effective Relationships**—Getting to know the other team members is one of the most important parts of building morale on the team. The members are not robots, and they need to get to know each other as human beings. When relationships are strong, relational tension will be weak, and people can focus on the work to be done.

**Step 5: Build Processes to Track Progress and Get Things Done**—Building processes and tracking progress are necessary for many reasons. This step builds efficiencies that allow a team to replicate its success. It also helps to keep stakeholders informed and team members aware of what is happening now and what needs to happen next.

**Step 6: Assess the Team Regularly for Top Performance**—Ideally, everyone needs to be aware of his or her strengths and then support fellow team members' development efforts. A leader who knows who needs support is a beautiful thing. No one possesses every skill and all knowledge, so self-awareness is helpful for the team's progress and ultimate growth and success.

**Step 7: Tap Into Creative Energy of the Team for Innovative Approaches**—A team can continue to do things the way it has always done them, but it can be energizing to develop creative solutions. Creativity and innovation can save time and money. Teams can be innovative about the end product or about how the team operates. A mix of left- and right-brain thinking can also be very powerful in the team environment.

**Step 8: Use Virtual Team Techniques Effectively**—Working remotely and participating on a team virtually is often challenging. Connecting with people you may never have met can make it harder to build trust and learn to rely on team members. Dependable technology and deliberately cultivating people skills can help to smooth out this step.

**Step 9: Deal with Team Problems and Move On**—All teams face problems. Perhaps the single most important quality of a team

is how it works through problems. This step identifies 10 different problem areas that many teams experience and gives tips on solving them.

**Step 10: Reward and Celebrate Success**—Many teams do not celebrate victories. Many organizations do not properly reward team successes. There are ways to reward teams that do not cost much and there are even some that cost nothing. If a team is making a significant contribution to the organization, it should get more than an email saying thanks. This step explores ways to recognize the contributions.

This book was written to be a very practical resource. Enjoy it and use it to be a stronger team member and to strengthen your team!

# Form the Team— Identify Leaders with Enthusiasm, Energy, and Vision

## OVERVIEW

What is a team?

Types of teams

What teams do for the organization

Members of the team

Stages of team development

Keys to success

*Teamwork is a journey and not a destination.*

—Kimberley Cornwell

Teams have been around since the beginning of recorded history. People have always worked together for a common goal. Take

military squadrons, sports teams, orchestras, and bands, for example. The entire foundation of teamwork is based on the belief that the whole is greater than the sum of its parts and that together we can accomplish more than we can by working independently.

In most organizations at work today, just about every group is referred to as a team. All too often, managers want to call their department's employees a "team" as a way to inspire the concept of team building. A word to the wise: Employees are rarely fooled! In truth, not all business issues are best addressed by the formation of a team. So, which situations need teams? What *is* a team? And,



how will you, as a manager or leader, know if you have an *effective* team? Let's begin by looking at the definition of team.

## What Is a Team?

*Webster's Dictionary* defines the word "team" as "a group of people associated together to work on or achieve a common goal or purpose." Though this may not always be the case, it is generally understood that teams pull together and that team members support each other and are collectively accountable for the work they produce.

Most teams have two things in common: They have coaches (or leaders) and players (or team members). Coaches, whose job it is to inspire the team, set the ground rules, monitor progress, and get out of the way so the teams can run the play and score the goal. The coaches, simply put, are the team leaders and facilitators. Players consist of the team members who communicate, collaborate, solve problems, and run the various plays to ensure specific tasks get accomplished and a successful outcome is achieved.

Teams share several common characteristics:

- ◆ The work and the outcomes are connected in a way that differs from the way that individual contributors operate. Team members are more interconnected and interdependent.
- ◆ Team members share accountability for the process and the results.
- ◆ There is a sense of shared commitment in the way that members interact and agree to work together to produce their end products.

The question was posed earlier about how you know if you have an *effective* team. So, in addition to the characteristics above, winning teams share these skills and abilities:

- ◆ communicate clearly
- ◆ are accountable
- ◆ are action oriented
- ◆ use effective listening
- ◆ are goal oriented
- ◆ use a participative decision-making style
- ◆ employ problem-solving skills and techniques
- ◆ are cross-culturally sensitive
- ◆ look beyond their own needs
- ◆ leverage conflict-management tools
- ◆ develop cooperative relationships
- ◆ relate well with management
- ◆ inspire trust.

## Types of Teams

There are many different types of teams in our society today. We will focus our discussion on teams operating in business organizations, such as executive teams, department teams, short-term or ad hoc process-improvement teams, longer-term self-directed teams, and permanent functional teams that span multiple departments. And, in today's work environment, virtual teams operating across time zones and continents are becoming increasingly commonplace. (Much more discussion is given to virtual teams in Step Eight.)

There are two key types of teams in business: independent teams and cross-functional teams. When forming a team, consider the type of team you need to accomplish the desired task.

**Independent teams** are self-managed. Each person works independently on the same task for the greater good of the team. Think of the "scramble" format used in golf. Each of the players hits a tee shot, and then the best shot hit by one of the group members is selected. The whole team then moves and each member drops his/her ball and plays from that location on the fairway. Players don't keep an individual score, they work for the good of the team.

**Cross-functional teams** are made up of members who have different expertise who often come from other areas of the business and all work together toward the common goal. Usually each team member performs separate tasks. A good example of this may be seen in a marching band where each member plays a different instrument simultaneously and works toward the common goal through a collaborative effort. In a cross-functional team, various departments often are represented to ensure they achieve an organization's mission.

## What Teams Do for the Organization

Organizations that use teams effectively to work through goals or operational challenges accomplish much more than simply solving an internal problem, they create a culture of self-motivated problem-solvers. According to Deborah K. Taber, an organizational development consultant who has been coaching corporate teams for over 20 years, "While teams may not be the solution to every business problem, they can accomplish many significant things." She points out that teams

- ◆ ***Are the Best Organizational Change Agents***—  
Organizational change is inevitable. The old adage that people don't mind the change as much as they mind having to be changed reflects the compelling truth that senior executives cannot effectively mandate or implement change. If an organization wants to reduce the amount of resistance to a proposed change, it should entrust several teams of employees to develop recommendations for the change and begin implementing them.
- ◆ ***Form Partnerships to Solve Operational Problems***—  
Effectively trained employee teams know what's what. They know what the customer service issues are and how to reduce costs and service errors, they know how to decrease lead times and cycle times on the shop floor, they know how to best manage the work processes, they know

what the problems are with the raw materials and where to find the lost supplies. Over the course of the last two decades we have come to understand that employees, not managers, are often the real experts on what is really happening on the front lines.

- ◆ **Network to Problem Solve**—Whether a team is formed from within a department or spans multiple departments, teams of employees already know who to talk to in adjoining departments regarding errors or omissions in the work process. Barriers often fall away when employee teams feel empowered to search out the source of their existing work problems.

## Members of the Team

Teams are made up of individuals who play different roles. As mentioned, the main distinction in team roles is between the team leader and the team members. Let's look at each role, beginning with the team leader.

**Team Leaders** maintain a constant balance between keeping the group on task, on the one hand, and allowing the team to make its own decisions on the other. Leaders are charged with keeping the team motivated and moving forward to accomplish its task. The best leader may or may not be a supervisor or manager of the group. Effective leaders never use positions of power to push their agendas. Team leaders communicate team progress with others, act as a coach when rules aren't being adhered to, become a cheerleader to encourage progress, and celebrate personal as well as team accomplishments.

**Team Members** participate and dedicate themselves to the team mission. Team members must be honest and have the ability to listen to others' perspectives. It is not necessary to be a subject matter expert to be an effective team member. It is crucial that

team members place their own agendas by the wayside for the good of the team. Great team members are often successful problem solvers. They often see opportunity where others see issues. Team members are bound together by mission, respect, and the realization that together they can work to achieve the mission.

The leaders who work most effectively, it seems to me, never say “I.” And that’s not because they have trained themselves not to say “I.” They don’t think “I.” They think “we”; they think “team.” They understand their job to be to make the team function. They accept responsibility and don’t sidestep it, but “we” gets the credit. This is what creates trust, what enables you to get the task done.

—Peter Drucker

## Choosing a Team Leader

Great care should be given to the selection of team leaders. They a crucial role in the success of the team by understanding and continually reinforcing the team’s vision. Also, team leaders have myriad team responsibilities—often in addition to their regular job duties. When determining who should fill this role, you will need to select individuals whose regular duties can be reduced or shifted elsewhere for a defined period of time while they are serving as a team leader.

It is important that the team leader directs the initial activities of forming the team, helping members learn new skills, and setting up the team’s mission, focus, and process. It is equally important that the team leader allow the team members to share responsibilities for problem solving and accomplishing project tasks. The

team leader should never try to maintain complete control over the team throughout the course of the team project.

Team leader responsibilities include

- ◆ scheduling and facilitating team meetings
- ◆ coordinating processes for the team
- ◆ serving as the liaison between the team and the rest of the organization
  
- ◆ coaching and moderating team members if and when there are any differences of opinion or personality clashes
- ◆ communicating effectively at all levels of the organization—in both written and verbal formats
- ◆ articulating the team's vision continuously and facilitating the vision's translation into action clearly enough for the team to stay motivated and on target
- ◆ serving as a liaison between the team members and any other team or committee
- ◆ coaching team members in building or strengthening skills.

The *skills* needed for the team-leader role can vary greatly from team to team and project to project. *Competencies*, however, for team leaders remain relatively the same. See

## POINTER

Vision is caught, not taught. People respond to vision.

—Terrence Donahue

## POINTER

**On Team Leaders**

Great team leaders are servant leaders. They see and hear between the lines of communications. They are intuitive, proactive, and great problem solvers. They recognize when a team member is struggling with personal issues versus with professional issues and skillfully address the issues with empathy and consideration.

—Sue Drake

## POINTER

Managing is about accomplishing the day-to-day tasks, including administration, coordination, and process. Leading is about transforming: big picture changes that excite and motivate. The best leaders can do both well and are worth their weight in gold.

—*Donald Sandel*

## POINTER

You do not lead by hitting people over the head—that’s assault, not leadership.

—*Dwight D. Eisenhower*

the pointer for an overview of common competencies required for this role.

## Leading Versus Managing

Sometimes there is confusion about the difference between leading a team and managing a group. A quote from a trusted colleague, Donald Sandel, summarizes this difference best (see pointer).

Another way to look at this distinction is shown in Table 1.1.

If you find yourself in a leadership role, use Checklist 1.1 to see if you are doing what it takes to be effective in leading your team. If you answer “no” to any of these questions, you may want to renew your efforts to change the answer to “yes”!

## Choosing Team Members

Ideally, the organizational sponsor (if there is one) and the team leader should identify the various departmental areas and skills needed for representation on the team. It is important to have all areas affected by the team’s project represented on the team. A

## Team Leader Competencies

### A team leader values:

- ◆ collaboration vs. individual contribution
- ◆ creative problem solving and innovation by supporting and initiating new ideas, methods, and solutions of the team.

### A team leader demonstrates:

- ◆ great team-building skills and sensitivity by getting others to work cooperatively
- ◆ concern for quality by monitoring quality and accuracy of others' work and by personally maintaining high standards of quality
- ◆ results orientation by focusing on setting and achieving challenging goals for self and others
- ◆ interpersonal relationship management and communication skills by sharing ideas, opinions, and feelings with others in a way that builds consensus.

### A team leader:

- ◆ uses analytical thinking to identify root causes to problems; uses a logical, sequential approach to problem solving; and weighs costs and benefits of possible solutions
- ◆ is skilled at breaking down goals and projects into component tasks, gives instruction effectively, and enlists team and organizational resources to accomplish tasks on time.



# TABLE 1.1

## Managing versus Leading

| Management  | Leadership   |
|---|--|
| Focuses on the bottom line: "How can I best accomplish things?" | Focuses on the top line: "What do I want to accomplish?" |
| Does things right   | Does the right things                                    |
| Efficiently climbs the ladder of success                        | Determines whether the ladder is against the right wall  |

# CHECKLIST 1.1

## Qualities of a Team Leader

Check the questions to which you can answer "Yes."

- Do people find you approachable?
- Do you make yourself accessible?
- Do you treat people fairly, equally, and with respect?
- Do you ask for opinions?
- Do you connect with team members individually as human beings?
- Do you build a relationship with each person?
- Do you know what motivates each individual?
- Do you help the group to manage and resolve conflict?
- Do you regularly provide feedback and show appreciation?
- Do you explain the reasons for your decisions?
- Do you meet commitments?
- Do you take a personal interest in the team members?
- Do you have relationships with others in the organization that will be helpful?
- Do you give everyone a chance?
- Do you give feedback without judging the individual?
- Do you stay open to differences?
- Do you recognize individual contributions as well as group accomplishments?
- Do you say "Thank you"?

Boxes without checks are potential areas to improve upon to develop your team leader skills.

manageable team size varies, but typically includes between five and eight members. Criteria for team membership might include these considerations:

- ◆ All areas affected by the project or by the various stages of the process being examined must be represented.
- ◆ The various levels of employees or management, professions, technical areas, trades, departments, or work areas should all be well represented.
- ◆ Employees who have expressed concern for this issue need to be included. Often, those employees who are most vocal are the informal leaders who will be instrumental in selling the ultimate solutions to other employees.
- ◆ Employees who have good ideas as well as those employees who like to “get things done” make valuable team members.
- ◆ It is better for the team to have employees with different personality “types.” Research has shown that teams composed of various types of individuals take longer to reach consensus but ultimately make better decisions than do teams consisting of similar personality types.
- ◆ Employees who can actively learn from mistakes are an asset.

## POINTER

Although it is sometimes hard to do, it is crucial that team members place their personal agendas by the wayside for the greater good of the team.

In some cases it may be difficult to include employees and their managers on the same team. Employees may feel intimidated or stifle their opinions with managers present. Consider inviting managers to a particular meeting and asking them to serve as consultants to the team when specific information or technical expertise is needed. There will be situations, however, when both (manager and employee) are needed for a team to be effective. It’s

### Five Stages of Team Development

1. **Forming**—The group explores relationships with other members and determines what behaviors are acceptable.
2. **Storming**—Members begin to participate and influence the team’s decisions.
3. **Norming**—The team identifies acceptable ways to interact with each other as members establish norms of acceptable behavior and operation.
4. **Performing**—Individuals begin to work cohesively within their established team expectations and experience success in achieving the team’s goals.
5. **Adjourning**—When the team disbands, members evaluate the team’s work, document its process, findings, and outcomes, and celebrate the team’s efforts.

good to be sensitive to these kinds of issues and have alternatives in mind.

## Stages of Team Development

So far we have examined what makes a team, characteristics of a team, how teams affect organizations, and the key roles on a team. Let’s turn our attention to the generally accepted stages that teams go through in the process of completing their mission. According to Scholtes, Joiner, and Streible (2003), who wrote *The Team Handbook*, there are five stages of team growth: forming, storming, norming, performing, and adjourning (see pointer).

Some teams progress rapidly through the first four stages in only a few meetings, whereas others struggle and stall in the storming stage for a long time. Sometimes, a team will experience norming or performing in one meeting and fall back into storming at

the next meeting. There is no correct formula for progression through the stages of team development. The key is to recognize and respond appropriately to the stage your team is in at any moment.

## Keys to Success

Over the years, I've led and been a member of many teams—some worked well and others didn't. From that experience I have found several key elements that are critical to any team's success: trust, shared vision, clear and comprehensive plan, diverse team members, and sustained momentum.

### Trust Is a Must

A lack of trust is perhaps the most pervasive problem facing any team. Invariably, team members come to meetings with personality conflicts, competing departmental agendas, and emotional baggage from old feuds. All of these things contribute to a lack of trust and cohesiveness among team members. Individuals working together must be able to trust one another, and that trust is built one interaction at a time.

Trust is a nebulous concept that exists in our minds and is based on perceptions and interpretations of others' behavior. Unfortunately, there is no magic bullet for creating initial trust or rebuilding it among team members once it has been violated. Trust is built by consistently acting with integrity and by continually doing what you say you will. One or two team-building exercises will not repair one or two month's worth of dysfunctional behavior and hurt feelings.

### Shared Vision

The main priority in establishing an effective team is to create a shared vision. The initial vision might have been handed down by a senior management team or it could be the product of a fact-gathering process. However the team's mission is developed, the

team effort will only be successful if there is a clear understanding of what the team is going to achieve and the scope of the undertaking is clearly defined. Start with a written statement of what the team is expected to accomplish—with any resources available, deadlines, schedules, or constraints clearly listed. Then, discuss the team's vision and determine if it is truly achievable. Appendix A offers tips and tools to use to set a firm foundation at your kick-off meeting.

The team should develop a list of questions and perceived barriers and decide if the scope is too big or inappropriate for this team to handle. It is important to emphasize that all members are encouraged to ask questions about the vision until they are confident that it can be achieved.

## Clear and Comprehensive Plan

Once the team's vision is clearly defined, another key to success is to establish a project plan or team action plan. The team members will find that the process of developing and refining the project plan can be a unifying process as long as all members are equally involved in this process. Sharing ideas during the initial action-planning stage allows for the identification of work steps, milestones, and needed resources.

## Diverse Team Members

My experience working with many different types of teams suggests that the best and most creative teams are made up of individuals with diverse technical backgrounds and personalities.

Although these kinds of teams take longer to get through the storming stage, they tend to see problems and solutions from very different viewpoints and therefore are better, more creative problem-solvers.

## Sustained Momentum

Teams often experience many different feelings and emotions throughout the course of the team's work. The initial stage is often

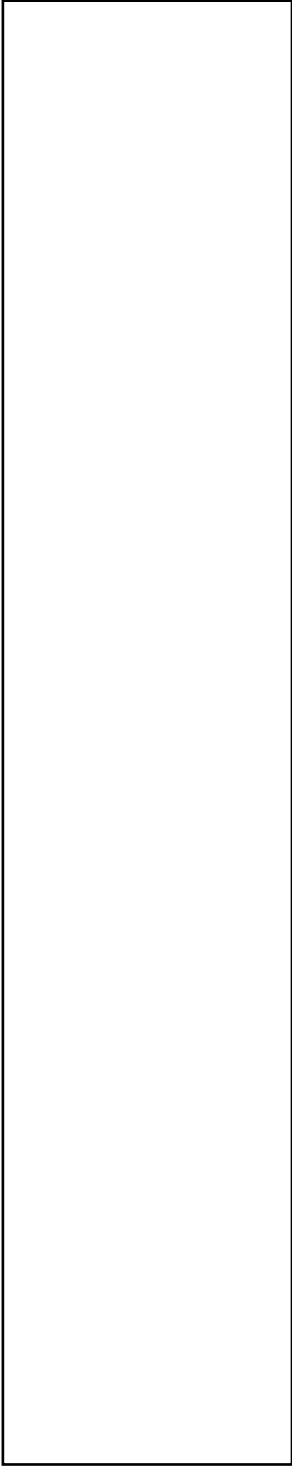
one of high expectations and optimism. However, as team members begin to work through the complexities of problem identification, fact gathering, and problem resolution, they can often become discouraged. The “ups and downs” of teaming are to be expected and should be managed by the team leader with a great deal of coaching and patience. Maintaining the team’s enthusiasm in the midst of looming deadlines and mounting work is a critical part of a team’s success.

## Make It Happen!

An important question to ask is: What does a great team look like? Peter Senge, author of *The Fifth Discipline*, describes it as “alignment—when a group of people function as a whole” (Senge 1990). In this state, he continues,

when a team becomes more aligned, a commonality of direction emerges and individuals’ energies harmonize . . . a resonance or synergy develops, like the coherent light of a laser rather than the incoherent and scattered light of a light bulb. There is commonality of purpose, a shared vision and understanding of how to complement one another’s efforts. . . . Team learning is the process of aligning and developing the capacity of a team to create the results its members truly desire. (Senge 1990)

Work with your team to find your own sweet spot or rhythm. Get in “alignment” behind your team mission and take your team to the next level.



NOTES:



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