

Tool: Team process – the basic steps

The most critical task for any new team is to establish their purpose, process and measures of team progress and success. Once the team has developed the following guidelines and charters specific to their purpose, they should be recorded on a flipchart and posted at every meeting for reference and reassurance.

I. Develop a Team Behavior Charter

1. Ground rules – develop consensus ground rules of acceptable and unacceptable individual and group behavior.
2. Decision making – determine whether decisions will be made by consensus, majority rule, or anarchy. Discuss whether there are, or should be, exceptions to when the team should not follow its usual process.
3. Communication – recognise the value of listening and constructive feedback, and make the effort, every day, to communicate constructively.
4. Roles and participation – discuss how the team will choose a leader, and generally how the team process will be led. The individuals and team must take responsibility to encourage equal participation.
5. Values – acknowledge and accept the unique insight of each member of the team.

II. Develop a Purpose Charter

1. Establish the answer to why the team exists.
2. Bring together the individuals who would work well together as a team. Determine whether each person has the knowledge, skills, and influence required to participate effectively on the team.
3. The team should discuss who its customers are. If the team has multiple customers, decide which customers have the highest priority, or at least how their needs will be balanced.

III. Develop Measures of Team Progress

1. Discuss and agree on the desired signals, which the team can assess both objectively and subjectively, that will indicate the team is making progress.
2. Discuss and agree on the types of measures and outcomes that will indicate the team has reached success or failure. Estimate the dates when any specific projects should be completed.

MAINTAINING MOMENTUM

Quite often teams start off with great strides, but then soon fizzle out. The real challenge, then, is to keep a team focused on its purpose and not the histories of its members and their relationships to one another.

A. Agree on the Improvement Model to Use

1. Standard steps – use your organisation's standard step-by-step improvement process or choose from the many published options.
2. Data – gather relevant data to analyse the current situation. Define what you know, and what you need to know, but know when to stop. Learn, as a team, to say when your work is good enough to proceed to the next step in the process.
3. Develop a plan – use your organisation's standard improvement model to provide the overall structure of a project plan. Estimate times for each step and for the overall project. Monitor and revise the plan as needed.

B. Use proven methods to gather any data needed for the work or project.

1. Data-based methods – use all the SPC tools, such as Pareto chart, run chart, etc. that reveal patterns within data. Many of these can be accessed online.
2. Knowledge-based methods – Use methods like affinity diagram, interrelationship digraph, etc., to help generate and analyse ideas to reveal the important information within. These tools help create consensus.

C. Manage Team Dynamics

1. Use Facilitators – A facilitator is a person who monitors and assists team members in order to keep their interactions positive, productive and moving forward toward the goal. In this way, the team can stay focused on its primary purpose while improving its working relationship.
2. Manage Conflict – As teams grow, so do the conflicts. This is part of the natural order of things that occur as communication becomes more open. The entire team can learn techniques for conflict resolution and use the facilitator as a resource.
3. Recognise Agreement – Managing agreement is sometimes a difficult endeavor. You should test for agreement often and writing down the points that everyone agrees upon as they occur.
4. Encourage Fair Participation – Each team member must eventually take responsibility for participating consistently in all discussions. Likewise, the entire team should be constantly working to slow down the dominant members and “pull-in” the more quiet members.

D. Ending Team Projects

Most teams and all projects eventually are concluded. Both often end in unsatisfactory ways or never really “officially end” at all. Before ending, the team should review the following checklist:

- Check results against original goals and customer needs.
- Identify any remaining tasks left undone.
- Establish the responsibility for monitoring the change over a specified time period.
- Document and train people in the new process, if applicable.
- Communicate the changes to everyone affected by them.
- Review team’s accomplishments for areas of improvement.
- Celebrate the efforts of the team with a lunch, pizza, newsletter article, special presentation, or some other expression of appreciation and celebration, tell stories about what you are proud of.

Other points to assist effectiveness in teams

- Get to know each other. If you're going to be working in a group with other people for any extended period of time, spend a few minutes talking at the outset of the first meeting. Introduce yourselves if you do not already know one another.
- Assign roles for the work and if the project requires working together in a group for an extended period of time to reach a specific goal. For instance you might designate one person the group leader or facilitator and another scribe or note taker.
- Exchange contact information to enable group members to communicate effectively outside of scheduled meetings if the work/project is long term.
- Identify the group's goal. For instance, perhaps a professor asked you to accomplish a specific task within your group, or your company asked you to research specific information and report back. Discuss and document the group's goal to make sure you all agree on the primary goal of the group's work.
- Divide tasks into steps and assign each member a specific task to attack long term projects. Often this will go easier if people volunteer for tasks they like to do.

- Listen to each other and encourage each other. Make sure everyone in the group is heard and offer encouragement when others contribute a good idea or perform a task effectively. Support each other when difficulties arise.
- Deal immediately with conflict if it arises. Although difficult to deal with, conflict or discord in a group can undermine the group's objectives. As quickly as possible, address any conflicts to keep the group members focused on the ultimate goal.

CONDUCTING AN EFFECTIVE MEETING:

A. THE PREPARATION

1. Decide on the purpose of the meeting.
2. Develop a meeting plan (i. e., who, what , when, where, how, why, how many, etc.).
3. Identify the meeting leader.
4. Prepare and distribute the meeting agenda.
5. Set up the meeting area (flip charts, overhead projector or any items needed).

B. THE BEGINNING

1. Start on time.
2. Introduce the meeting leader.
3. Allow team members to introduce themselves.
4. Ask for a volunteer timekeeper.
5. Ask for a volunteer recorder.
6. Review, change, or revise the order of the agenda.
7. Establish time limits.
8. Review any prior meeting action items.

C. MEETING ETIQUETTE

1. Be recognised before speaking – don't interrupt others.
2. Be brief and to the point.
3. Make your point calmly.
4. Keep an open mind and listen to others attentively.
5. Listen without bias.
6. Understand what is said.
7. Avoid side conversations.
8. Respect other opinions.
9. Avoid personal agendas.
10. Come prepared to do what's good for the company.
11. Have fun.

D. ENDING

1. Develop action items (who, what, when, where, how).
2. Summarize the meeting with the group.
3. Establish the date and time for a follow-up meeting.
4. Evaluate the meeting.
5. End on time.
6. Clean the meeting room or area.

E. THE NEXT STEPS

1. Prepare and distribute the meeting activity report.
2. Follow up on action items.
3. Go to "Preparation" and start over for the next meeting.