

10

How Effectively Are We Working Together? The Team Self-Evaluation

David L. Hultgren
Sid Henkin

OVERVIEW

The Team Self-Evaluation was developed in direct response to a specific client need. Within the client's organization, over 400 teams had specific mission statements and specific outcome statements. All of the teams were initiated using the same training process. Some teams were successful, others failed. No specific incident that could be identified caused team failure.

Analysis determined that the team breakdowns occurred when the individuals focused primarily on task and neglected team hygiene and maintenance. Essentially teams failed when they felt they were a team by virtue of structure and training rather than being a team by virtue of practice and maintenance.

The Team Self-Evaluation was developed to allow a team to quickly measure at any time the alignment of its members with ten team success factors. The instrument will indicate the cause of team process breakdown. The instrument can be used both as a pre- and post-measure, and it indicates the degree of improvement a team has made in gaining alignment.

In addition to providing immediate feedback for the individual team, the aggregate data can be used by the organization to identify trends in team development and common gaps.

The instrument exists in both manual and electronic versions depending on the needs of the organization. The instrument and analysis remain constant; only the media differs.

OBJECTIVES

Team Level:

- To provide team members with a quick view of where they are in or out of alignment with one another measured against ten team success factors.
- To identify those factors that are the greatest barriers inhibiting the team's ability to get work done.
- To provide both a pre- and post-measure of the team's progress in reaching higher levels of alignment.
- To provide a team "health and maintenance" check before doing work.
- To provide "spot checks" to identify possible causes whenever a team doesn't feel it is functioning well

Organization Level (Aggregate team data collected over the entire organization):

- To identify trends in team development both organization wide and unique to specific areas.
- To develop baseline and improvement trend measurements that can be correlated to business objectives.
- To identify areas for team improvement on an ongoing basis.

PARTICIPANTS

The two primary populations of participants are:

- Members of existing teams
- Members of teams that are just being formed

In both cases the participants are those individuals who are actively involved in the work of the team.

Members of existing teams use this instrument periodically as a team health barometer at the end of team meetings and as a “spot check” when the team seems to be functioning poorly.

Members of teams that are just being formed use this instrument to focus on ten critical success factors for team development. The success factors become criteria which help shape acceptable behavior. The instrument provides a baseline measure of how well they are aligned as a team which the team can use to direct its development.

TIME

The actual time for using the instrument ranges from 10 to 30 minutes. If the instrument indicates a need to pursue discussion on a given success factor the team leader or facilitator can make a judgment call about allocating additional time.

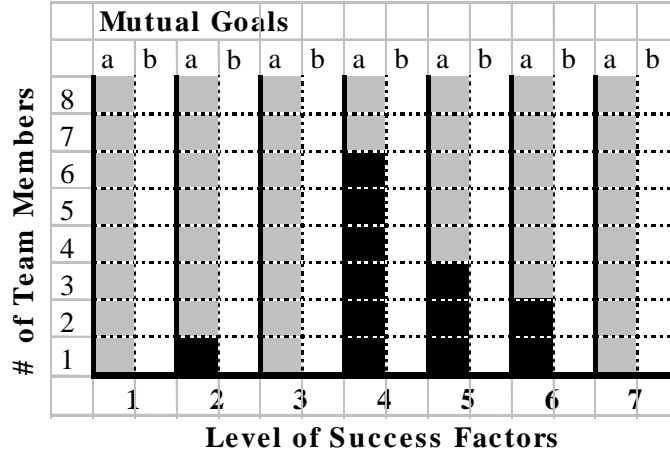
MATERIALS

1. Two Team Self-Evaluation forms for each team member
2. A “What Is a Team?” sheet for each team member
3. A scoring device, such as any one of the following:
 - Scoring format sheet
 - Scoring format overhead transparency
 - Scoring software developed in both Microsoft Excel and Microsoft Access

PROCESS

1. At the beginning of the team meeting the facilitator or team leader distributes the Team Self-Evaluation forms and the “What Is a Team” sheet to each participant.
2. Each participant completes the form based on his or her own judgment.
3. The facilitator or team leader tallies the scores either manually or electronically:
Manual: Place the number of responses for each level of each success factor on the formatted sheet or overhead transparency. (Example 1)

Example 1

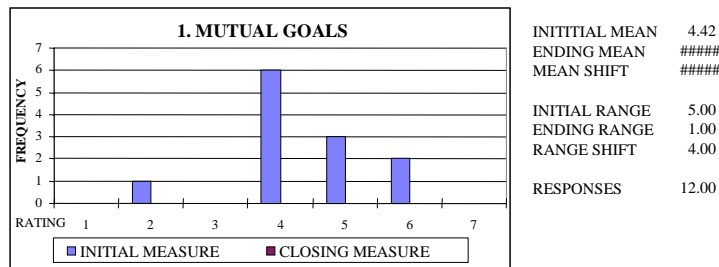


Column “a” is for entry of the first set of measures, the baseline measurement.

Column “b” will be used later to measure change.

Electronic: Enter the data into the input screen and the system will do the calculations and provide the numeric data. (Example 2)

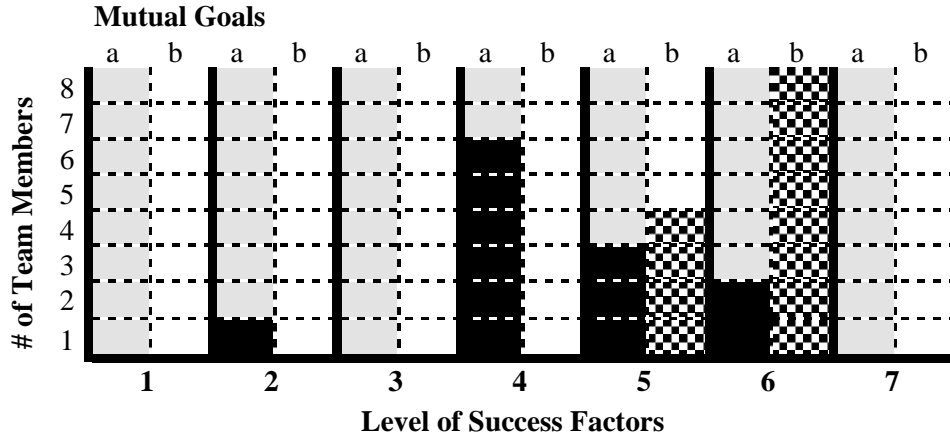
Example 2



- The facilitator or team leader opens the discussion by asking, “Is there anything here that we should discuss?” Looking at **example 1**, it is apparent that there is one team member who is not at all aligned with the rest of the team regarding Mutual Goals. This outlier may well cause real resistance in the team moving ahead. This is an example of an immediate issue that can proactively be addressed before the team tries to do work. This step is dependent on the skill of the facilitator or team leader.
- Later in the team’s life, the facilitator can administer the Team Self-Evaluation again to see if there is greater alignment within the team.

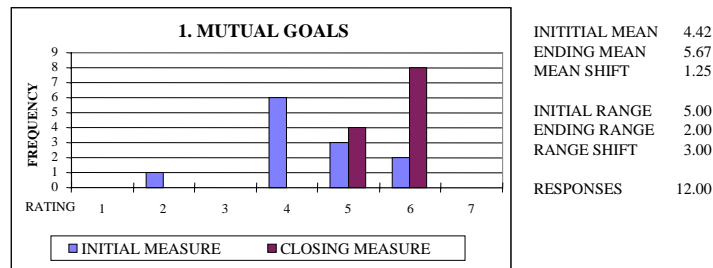
Manual: Place the number of responses for each level of each success factor on the formatted sheet or overhead transparency. (Example 3)

Example 3



Electronic: Enter the data into the input screen and the system will do the calculations and provide the numeric data (Example 4).

Example 4



6. If the movement has been positive the team members can celebrate their success. If there is no movement or negative movement the facilitator or team leader should return to step 4.

VALUE TO THE TEAM

While mean shifts and range shifts are interesting and helpful, especially from an organizational viewpoint, we caution teams not to get lost in the numbers. The real value of the instrument lies in the discussion of which items we need to improve on and how we can improve as a team. The instrument is a diagnostic tool. It is imperative that the team leader or facilitator guide the discussion to focus on:

1. Where do we agree we're doing well (small range and higher mean)?
2. Where do we agree we need to work (small range and lower mean)?
3. Where does there seem to be a wide range of opinion on how well we're doing—which could pinpoint areas of potential conflict (high range score)?
4. Which are the most important items for us to improve on?
5. Most importantly, what specific actions can we take to improve the identified areas?

SIGNIFICANCE OF THE MEASUREMENTS

Mean Shift. The mean shift indicates how much the mean/average score for that item has moved, either positively or negatively, between measurement cycles. There is no ideal mean, the real value is indicating the progress the team has made.

Range Shift. The range indicates how far apart the highest and lowest ratings are. The smaller the range, the greater the agreement and alignment of team members, the greater the range the less agreement or alignment. The range shift indicates how much the differences in range measurements have changed during the measurement intervals.

These measures are done automatically in the electronic system and can be calculated manually if the facilitator or team leader thinks it is necessary.

For more information on the scoring software, please phone Sid Henkin at Prism Learning Solutions at 248-788 9294.

What Is a Team?

How many of you have ever been part of a team that was really effective. What did it feel like?

Effective teams are considered to have five essential building blocks, around which this workshop is structured.

1	Mutual Goals	The team must have a mission or reason for working together that is shared by all team members.
2	Inter-dependence	Members of the team must be interdependent— they need each other's experience, ability, and commitment in order to arrive at mutual goals.
3	Commitment to Synergy	Team members must be committed to the idea that working together as a team leads to more effective decisions than working in isolation.
4	Accountability	Individual team members are accountable to themselves and to the team. The team must be accountable as a functioning unit within a large organizational context.
5	Empowerment	The objective of empowerment is to have decisions made not by hierarchy, but by the people closest to the customer. Team members know the team is expected to make most decisions itself and that the team is held accountable for the quality of its results, not the number of approvals it obtains.

The most obvious example of a team is an athletic team. The members have a purpose, which gives them an identity. Each player has a unique function (position) that must be integrated with that of the other members. The players are aware and supportive of the need for interdependent interaction, and the team operates within the framework of a larger organization (usually a league).

Teams will be effective to the extent that they develop the essential building blocks and continue to practice them over time.

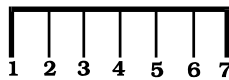
But, as in any building effort, the team essential building blocks need mortar to hold them together. The following elements are the mortar or glue for a team.

6	Interpersonal Communications	The team must have open, honest, reliable communication that provides each team member with the information needed to understand goals, processes, and responsibilities.
7	Trust	Without trust the most well-constructed team risks crumbling. Members must know they can rely on each other at all times, even under the most trying of circumstances.
8	Problem Solving, Decision Making	The most effective teams have agreed-upon ways to approach problem solving and decision making. This helps focus energy efficiently and reinforces the importance of process in conducting team business.
9	Conflict Resolution	Conflict can be useful when the energy it generates is channeled to productive ends. Effective teams need well-defined processes for resolving conflicts.
10	Facilitative Leadership	Different situations require different leadership approaches, from directive to facilitative and all areas in between. Leadership must be shared and must provide opportunities for creativity and pursuit of mutual goals.

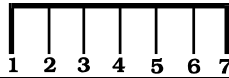
TEAM SELF-EVALUATION

Instructions: Indicate on the scales that follow (1 low, 7 high) your assessment of your team and the way it functions by circling the number on each scale that you feel is most descriptive of your team.

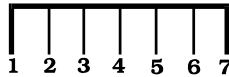
1. Mutual Goals

Lack of common understanding  Clear understanding of agreement

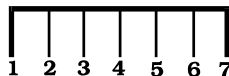
2. Interdependence

Team members rarely seek to understand issues, experiences, and skills of teammates  Team members actively seek to understand issues, experiences, and skills of teammates

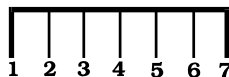
3. Commitment to Synergy

Team decisions are usually win-lose; individuals promote their position exclusively  Win-win decisions are actively sought by all team members

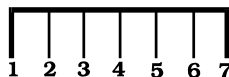
4. Accountability

Accountability is based on functional objectives; members participate/contribute little to team goals  Team members hold themselves and others mutually accountable for achieving team results; all members participant/contribute to team goals

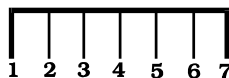
5. Empowerment

Usually reluctant to make decisions and take actions to produce results  Usually willing to make decisions and take actions to produce results

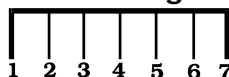
6. Interpersonal Communications

Closed and Guarded  Open and Participative

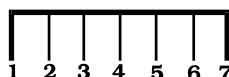
7. Trust

Little trust  Trust is evident

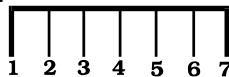
8. Problem Solving/Decision Making

Members have not agreed on an approach to problem solving and decision making  Members have a well-established, agreed on, and utilized approach to problem solving and decision making

9. Conflict

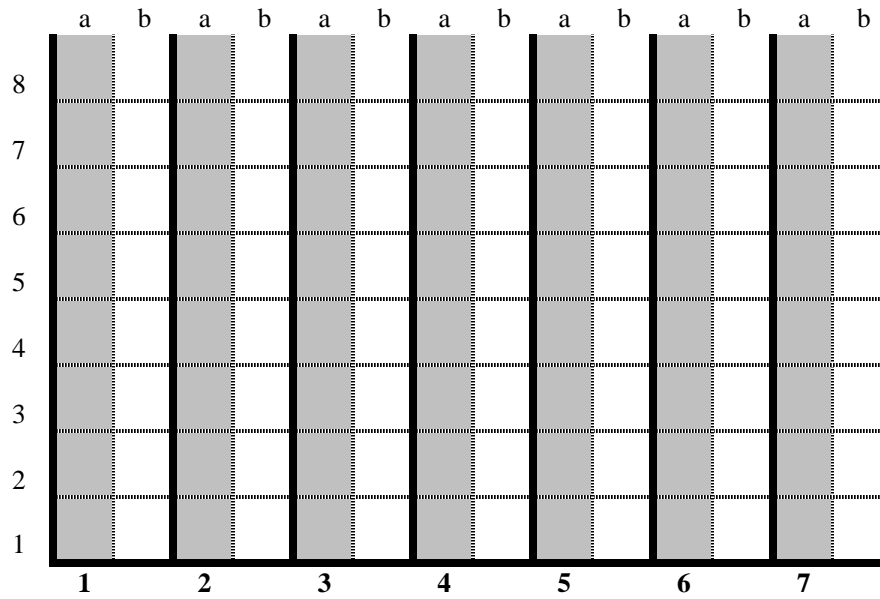
Conflict is evident but is ignored or is not constructively resolved  Conflicts are constructively resolved

10. Facilitative Leadership

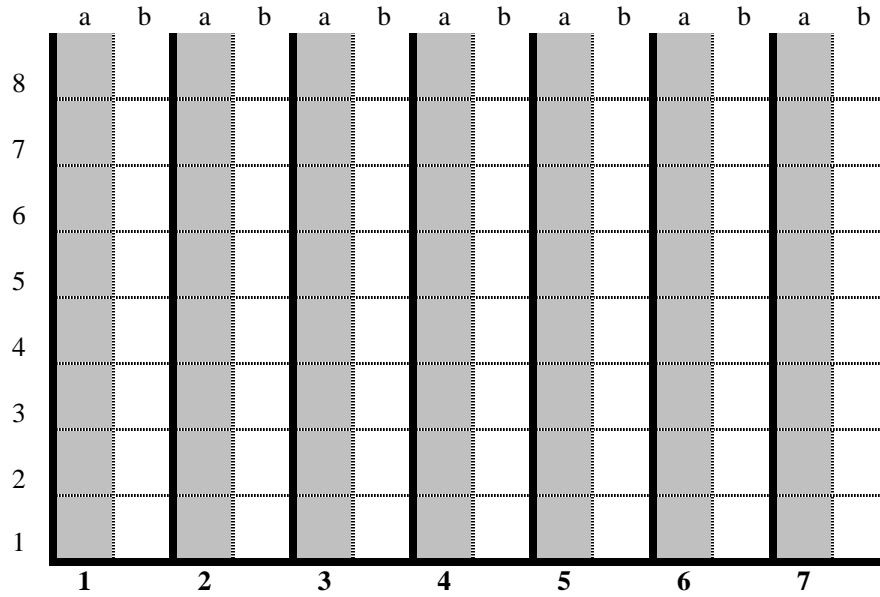
Leadership is rigidly viewed as a role or assignment; often inhibits creation and accomplishment of team goals  Leadership is flexibly shared and facilitates creation and accomplishment of team goals

Team Self-Evaluation Scoring Sheet

Mutual Goals



Interdependence



a = first measure
b = second measure

1-8 = number of responses
1-7 = level of success factor

Team Self-Evaluation Scoring Sheet

Commitment to Synergy

	a	b	a	b	a	b	a	b	a	b	a	b	
8													
7													
6													
5													
4													
3													
2													
1													
	1		2		3		4		5		6		7

Accountability

	a	b	a	b	a	b	a	b	a	b	a	b	
8													
7													
6													
5													
4													
3													
2													
1													
	1		2		3		4		5		6		7

a = first measure
b = second measure

1-8 = number of responses
1-7 = level of success factor

Team Self-Evaluation Scoring Sheet

Empowerment

	a	b	a	b	a	b	a	b	a	b	a	b	
8													
7													
6													
5													
4													
3													
2													
1													
	1		2		3		4		5		6		7

Interpersonal Communications

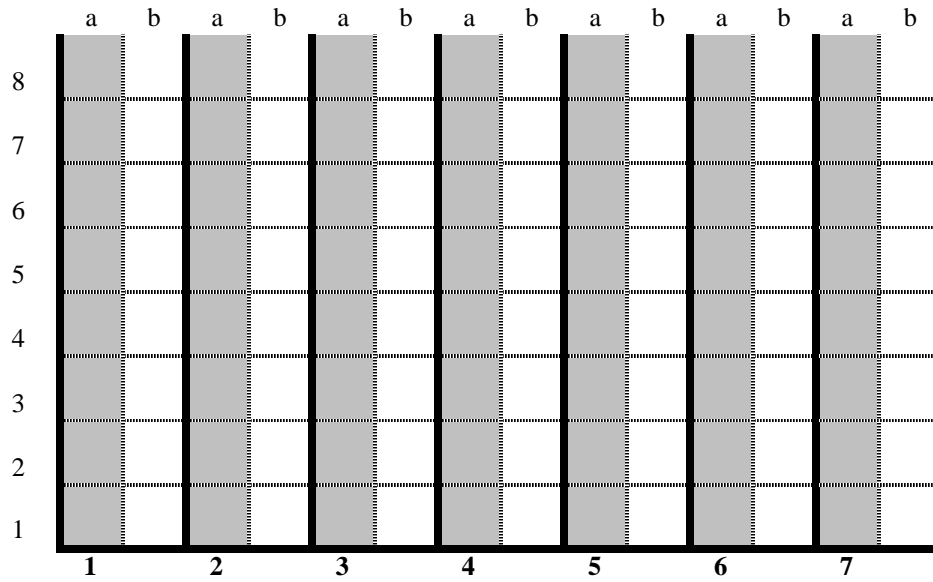
	a	b	a	b	a	b	a	b	a	b	a	b	
8													
7													
6													
5													
4													
3													
2													
1													
	1		2		3		4		5		6		7

a = first measure
b = second measure

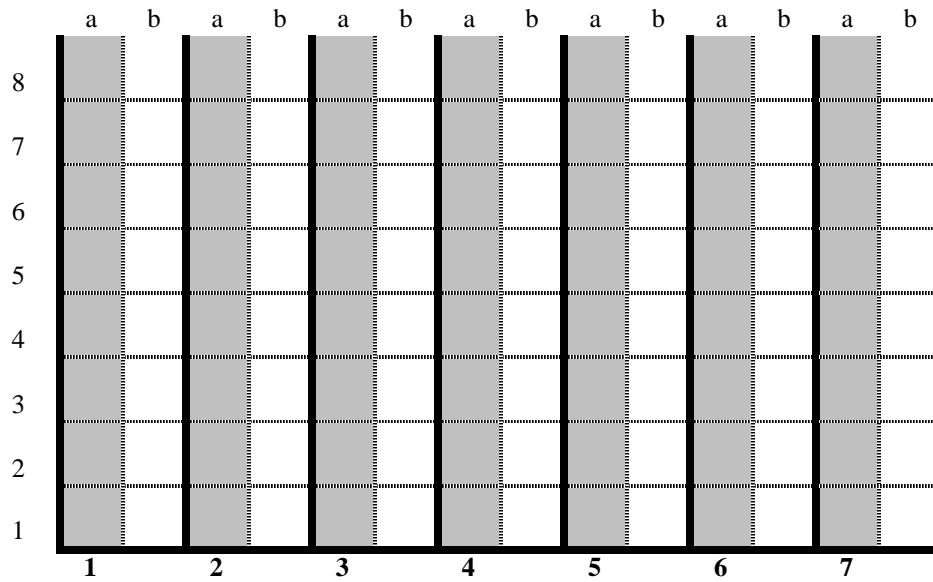
1-8 = number of responses
1-7 = level of success factor

Team Self-Evaluation Scoring Sheet

Trust



Problem Solving, Decision Making



a = first measure
b = second measure

1-8 = number of responses
1-7 = level of success factor

Team Self-Evaluation Scoring Sheet

Conflict Resolution

	a	b	a	b	a	b	a	b	a	b	a	b	
8													
7													
6													
5													
4													
3													
2													
1													
	1		2		3		4		5		6		7

Facilitative Leadership

	a	b	a	b	a	b	a	b	a	b	a	b	
8													
7													
6													
5													
4													
3													
2													
1													
	1		2		3		4		5		6		7

a = first measure
b = second measure

1-8 = number of responses
1-7 = level of success factor

About the Contributors

David Hultgren is a senior consultant at Prism Learning Solutions. He has been involved in education and training for 25 years, and has a broad range of experience working with the adult learner. Since 1985, he has served as a corporate consultant and trainer.

David has been involved in the design, development, and delivery of training programs to build skills in team building, leadership, communication, speaking, and selling. In one team implementation program, he was instrumental in developing, training trainers, and implementing the quality control of the program's content and delivery through the roll-out of over 450 teams, in 43 countries.

David's experience in Instructional System Design (ISD) led him to co-author a workshop entitled *A Systems Approach to Training: Demystifying the ISD Process*. He has also developed a model for understanding and increasing individual spheres of influence in organizations. David built on his early career experiences, directing a program to increase effective instruction of cultures and situations in other countries, to lead the development efforts on Prism's Global Perspectives workshop.

David holds a Ph.D. in Education from Michigan State University. His work there emphasized curriculum development and instruction.

Sid Henkin is vice president of market innovation at Prism Learning Solutions. An author, speaker, and consultant, Sid helps companies in industries as diverse as fast food restaurants and international high technology to use creativity to overcome challenges that often threaten their very existence. To do this he draws on expertise ranging from practical business experience to classical Greek, mathematics, and quantum physics.

Most recently, Sid led a team that successfully implemented 454 customer-focused teams in 41 countries in seven languages within an 18-month period for AT&T Global Information Solutions. Prior to that, Sid led a team that implemented a quality-based selling process and curriculum structure for Volkswagen Canada. A sampling of the affected dealerships showed a 41% increase in sales.

In addition to publishing numerous magazine and trade journal articles, Sid is a contributing author of *The Franchising Handbook*, a book reflecting the latest approaches to management, operations, marketing, financial, and legal issues. Sid is also a frequent international speaker for numerous professional associations and has served on advisory councils for equipment manufacturers and on the boards of several trade and professional groups.