



51A Middle Street Newburyport MA 01950
Phone: 800-588-7039 Fax: 877-902-4284
contact@bhfe.com www.bhfe.com

Course Information

Course Title: *Developing and Managing Teams* #365318

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In accordance with the standards of the National Registry of CPE Sponsors CPE credits have been granted based on a 50-minute hour.

CPA: 4 (All states)

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Course Description

Teams are needed to solve problems and oversee projects; in many cases, they are the source of most of the innovation in a company. This course shows you how to create and manage high-performance teams. It does so by describing when to use teams, why it is critical to staff a team with a mix of personality types, and how to assemble the right team. The course also notes the importance of emotional intelligence, conflict resolution, and consensus building. It addresses many additional team topics, including how to manage a team, self-directed teams, and the decision-making process within a team. In short, this course provides an essential set of tools for accelerating team performance.

Program Delivery Method: QAS Self-Study (interactive)

Subject Codes/Field of Study

NASBA (CPA): Business Management & Organization

Course Level, Prerequisites, and Advance Preparation Requirements

Program Level: NASBA (CPA): Overview.

This program is appropriate for professionals at all organizational levels.

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Advance Preparation: None

Course Content

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Instructions for taking this course

A passing grade of at least 70% is required on the final exam for this course. The exam may be retaken if not passed on the first attempt (no charge).

Complete the course by following the learning objectives listed below and studying the review questions after each major section (or chapter) in the text. Once you are confident that the learning objectives have been met, answer the final exam questions (online).

Instructions for Taking the Final Exam Online

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Learning Objectives

- Recognize the essential components of a team, the types of teams that can be formed, and their purposes.
- Identify the types of team players and the characteristics of each one.
- Specify the issues experienced by ineffective teams.
- Recognize the characteristics shared by the best team members.
- Specify the impact of team size on a team.
- Understand the value and concerns associated with each type of communication method.
- Specify the characteristics of an effective team.
- Recognize the different types of listening that a team member can employ.
- Identify the steps that can be taken to create a culture that favors teams.
- Specify the types of decision-making systems that a team can use, when they work best, and when they can go wrong.
- Identify the approaches that can be used to improve the quality of team decisions.
- Recognize situations in which a team may be dispersed.
- Specify how to create an emotional connection between the members of a dispersed team.

About the Author

Steven Bragg, CPA, has been the chief financial officer or controller of four companies, as well as a consulting manager at Ernst & Young. He received a master's degree in finance from Bentley College, an MBA from Babson College, and a Bachelor's degree in Economics from the University of Maine. He has been a two-time president of the Colorado Mountain Club, and is an avid alpine skier, mountain biker, and certified master diver. Mr. Bragg resides in Centennial, Colorado. He has written the following books and courses:

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Table of Contents

Chapter 1 - Introduction to Teams	1
What is a Team?.....	1
What is a Work Group?.....	1
When to Use a Team	2
When Not to Use a Team	2
Types of Teams.....	3
Recommendation Teams	3
Ongoing Activity Teams	4
Design Teams	4
Management Teams.....	4
Customer Account Teams	5
Types of Team Players	5
The Optimum Number of Teams	6
Scaling Issues.....	7
Chapter 2 - Team Development	9
The Purpose of a Team.....	9
Issues Impacting Ineffective Teams.....	9
Identification of Team Members.....	10
Team Sizing	11
The Statement of Work	12
Team Structure.....	12
Team Direction	12
Work Assignments	13
The Work Load.....	13
Team Transitions.....	13
Communication Systems	14
Collaboration Issues	14
Team Emotional Intelligence.....	15
Team Engagement.....	17
Team Training.....	17
Multi-Team Members.....	18
Backup Planning	18
Conflict Resolution	19
Dealing with Counterproductive Behavior.....	20
Internal Conflict Resolution.....	20
Socialization Levels	21
Innovation Issues.....	21
Basic Compensation.....	21
Incentive Compensation	22
Team Rewards.....	23
The High-Performance Team	23
Team Duration	24
Team Termination.....	24
Keys to Team Success	25
Characteristics of an Effective Team	25
Chapter 3 - Team Management	28
Management Style.....	28
Management Behavior.....	29

Listening Skills	30
Coaching Skills	30
Leadership Sharing.....	31
The Management Group – Team Interface.....	31
Management’s Treatment of Teams.....	32
Periodic Status Meetings	33
Milestone Analyses	33
Team Measurements.....	33
Team Urgency	34
Team Budgeting	34
External Reports.....	35
Self-Directed Teams.....	35
Chapter 4 - Team Decision Making.....	39
The Decision Making Process	39
Consensus Building.....	40
Incorrect Consensus Outcomes.....	40
Causes of Faulty Decisions.....	41
Group Pressure.....	41
Conformity	41
Decision Cascades	42
Polarization.....	42
Confidence.....	42
Improvements to the Decision Making Process.....	42
Deviant Thinking	42
Chapter 5 - Dispersed Teams.....	45
Managing the Dispersed Team	45
Emotional Connection.....	45
Forms of Communication.....	47
Team Size	48
Rules.....	48
Web Page.....	48
Summary	49
The Team Leader	49
Multicultural Issues	49
Time Zone Issues	50
Answers to Course Questions.....	52
Glossary	56
Index	57

Chapter 1

Introduction to Teams

Learning Objectives

- Recognize the essential components of a team, the types of teams that can be formed, and their purposes.
- Identify the types of team players and the characteristics of each one.

Introduction

The team concept is bandied about regularly in business circles. It can have an almost mystical appeal, since some teams have produced outstanding results. However, in other cases, the concept has not been clearly understood or teams have been poorly developed and managed, yielding poor results. In this chapter, we are primarily concerned with clarifying the nature of a team, the types of teams, and when they should be used. We also describe the types of people who serve on a team.

What is a Team?

A team is a group of people with complementary skills, which works together to attain a specific goal. This group is mutually responsible for its output. These are the essential components of a team – skills, togetherness, mutual responsibility, and a shared goal.

Team members work closely to explore ideas, decide on future direction, deliver outputs, and measure the performance of the group. Participants may share work or rotate jobs among the group over the course of a project. In essence, a team creates a work product through the joint efforts of its members.

EXAMPLE

An inventory review committee meets once a month to root through the inventory and tag items for disposition that are not going to be used in the production process. Also, the group meets briefly for a well-defined purpose at stated intervals, so there is no need for the ongoing exchange of ideas. This is not a team, since the task is essentially clerical.

The president of a company assembles a task force to explore the development of an entirely new product line. This group is taken away from its normal jobs, and given a specific target and funding. The group works together for the next six months, sifting through product ideas and developing a vision for how a new product niche could be created. This is a team, since the entire group is working together to find a solution, and will be mutually responsible for the final set of recommendations given to the president.

What is a Work Group?

A work group is comprised of several people who work together, but who are not interdependent. The most common example of a work group is a department, where a supervisor manages a group of people. Each person has a clearly delineated task, and all key decisions are made by the supervisor. The supervisor may set a separate goal or group of goals for each person in the department. The group usually meets occasionally to go over status updates. A department is not considered a team, because each person works separately, and the supervisor is solely responsible for the work product.

An effective team can seriously outperform a work group, because the team is working together intensively in ongoing meetings, whereas the work group is not. Further, members of the team know that they are all accountable for their output, which is not the case in a work group.

When to Use a Team

A team is designed for a special purpose, where there is a clear goal to be achieved. These situations do not arise every day. In a typical organization, most of the staff is solely concerned with conducting daily operations – basic production, fulfillment, sales, maintenance, and accounting tasks. Only when a few targeted improvement opportunities arise will there be a need for a team. Examples of possible uses are:

- A company is rapidly losing market share to lower-priced products that a foreign competitor has just introduced. It needs a radically lower-cost product within the next few months.
- The management group decides that the sales process is antiquated. It wants to introduce portable wireless computers, so that salespeople can take orders in the field. There is a rumor that several competitors are contemplating the same change, so the new system must be designed and rolled out quickly.
- An organization has a persistent problem with backordered customer orders, so that few orders are fulfilled at once. Customers are fleeing. A solution must be found as soon as possible.
- A pharmaceutical company needs to push a promising new drug through the regulatory pipeline as rapidly as possible.
- The manager of a hospital wants to alter how care is provided to patients, so that a coordinated team approach is employed.

The normal hierarchical structure of a business is specifically designed to conduct daily operations. There are department managers for each functional area, and the processes of each of these areas are specifically designed to sell goods and services as efficiently as possible. The trouble with this structure is that it is *not* designed to support teams, which necessarily must operate outside of the normal processes. Thus, teams can be considered an anomaly within an organization, and so will be limited to quite a small proportion of the total workforce.

A good way to decide whether a business is ready for the team concept is to observe the degree to which employees interact. If there is already a high level of collaboration among employees, and managers routinely seek out the opinions of others before making decisions, then there is fertile ground in which to plant teams.

From a manager's perspective, teams are only used when there is a need to side-step or improve upon existing processes or products. When such a need exists, the existing corporate structure is ill-suited to make improvements, so a team is created to address the issue.

When Not to Use a Team

Teams will not flourish in certain environments. Instead, they are treated as management's "flavor of the week," tolerated for a short time, and then allowed to die out. In these cases, there are fundamental problems with an organization that must be addressed first, before even attempting to form teams. Examples of an environment in which teams will not flourish are:

- *Bad labor relations.* There has been a history of management/union strife. If teams were dropped into this environment, they would be viewed by the unions as being imposed to reduce the power of the unions.
- *Excessive work rules.* If there are very specific work rules in place (usually as defined under a union contract), it can be difficult for teams to propose adjustments that will not conflict with those rules.

Introduction to Teams

- *Silos are the norm.* When activities are organized into strong functional silos (such as the accounting department or the production department), it is harder for teams to operate, since they normally function outside of the normal process flows of a business.
- *Poor management direction.* If the senior management team has a history of continually changing its strategic direction, then it is highly likely that any teams that are formed will be terminated as soon as management chooses a different direction.
- *Poor training.* The employee compensation level may be quite low, which has forced management to only hire people with minimal skill sets. These people will require a large amount of training before they can be fully-performing members of a team.
- *No profits.* If a business generates minimal profits, teams will be dropped if they cannot generate discernible profits within a short period of time.

Consequently, if teams have been tried in the past and failed, it may be due to the existence of one or more of the preceding issues. The management team may need to fix the underlying problems before it attempts to create teams again.

Types of Teams

There are multiple types of teams, which can be defined by their expected output. The type of team can alter its membership, management, and focus. The types of teams are described in the following sub-sections.

Recommendation Teams

Many teams are assembled for the purpose of making a recommendation to management regarding a course of action. Examples of recommendation teams are:

- How to improve the safety of a manufacturing process
- How to reduce the cost structure of an acquiree
- Whether to expand into a new product niche

A key characteristic of a recommendation team is that it operates under time pressure. There is likely to be a specific deadline by which a recommendation must be made. This is because a particular incident may have triggered the formation of the team. For example, we just noted that this team could make recommendations concerning the safety of a manufacturing process; it is likely that such a team was formed immediately after someone was injured in a production activity.

Because of the time pressure imposed on a recommendation team, it is critical that this group be well-organized from the start, and fully supported by management. Doing so requires the following items:

- *Well-defined direction.* The team must have a complete, well thought-out direction at once. This is needed to ensure that the correct resources are assigned to the team, and that the deadline can be met without time wasted in the exploration of unnecessary paths.
- *Full staffing.* Since the required outcome is needed on an accelerated basis, the team must be fully staffed at once with people having the appropriate skill sets.
- *Full support.* When the team encounters any obstacle that it cannot surmount by itself, the management team must be willing to step in on behalf of the team to eliminate the problem. Otherwise, it will be difficult to meet the deadline.

Once the team has delivered its recommendations to management, its task is not yet over. The biggest problem with recommendations is that they are not enacted, so the team leader also needs to push management to authorize an implementation process. This has two possible outcomes. One is that the recommendation team is then tasked with implementing its own recommendations. The other outcome is that at least

some members of the team are tasked with handing off their recommendations to a designated implementation group. In the latter case, it is important to involve the implementation team as early as possible, so it may be necessary to bring these people into the recommendation team before the final recommendations are implemented. By doing so, the implementation team has a hand in the final recommendations, and so is invested in the final work product.

Ongoing Activity Teams

A business may have several self-governing teams that are involved in the improvement of business functions. These teams tend to be in value-added areas, where the intent is to improve service or reduce costs. Examples of the areas in which ongoing activity teams may be found are manufacturing, field service, customer service, marketing, and sales. These teams are especially useful in situations where there are complex problems and the solutions to them are not immediately clear.

An ongoing activity team is not subject to a specific completion date, because its work never ends. Instead, this team is constantly evaluating how to improve performance in its designated area of operations. Despite the lack of a clear deadline, management still places pressure on these teams to perform by assigning ongoing performance measurements, such as cycle time reductions achieved, error rate reductions achieved, or costs reduced.

Ongoing activity teams are more likely to require highly specific skills that pertain to the projects in hand, so it may be necessary to occasionally add people who have the required skills. At a minimum, these teams should include a large proportion of members who have a proven ability to learn new skills, so that they can expand their knowledge as needed to address the demands of the most recent project.

A common feature of an ongoing activity team is that the members work together for long periods of time. A long team duration takes advantage of the slow accrual of trust within the team, as well as their enhanced ability to work together that comes with the passage of time.

An ongoing activity team is constantly spinning off recommendations to management for changes that can be made. However, unlike the recommendations team concept that was noted in the preceding sub-section, an ongoing activities team is more likely to engage in implementations itself. By doing so, there is no risk of a recommendation being dropped as part of a failed handoff to a separate group. Instead, the team formulates recommendations and then immediately rolls into the implementation phase of the work.

Design Teams

A design team is usually involved in the generation of new product designs, or incremental changes to existing products. These teams may stay together for long periods of time, and in that respect are similar to ongoing activity teams. However, design teams operate under highly specific timelines and cost rules. For example, a design team may be tasked with creating a product design in six months that costs no more than \$100 to construct. Because of the additional constraints and targets imposed on this type of team, it is important that this group be well-organized and fully supported by management, as described earlier in the Recommendation Teams sub-section. Thus, a design team contains elements of the characteristics of recommendation teams and ongoing activity teams.

Management Teams

A management team is a group of supervisory personnel that focuses on performance results for a functional activity, program, business unit, division, or even an entire entity. Most management groups are *not* teams, because they are not focused on substantial performance improvements. Instead, most managers simply work together to meet the annual target outlined in the company budget. For a management group to be a team, there should be a stretch goal that requires the group to closely coordinate their activities. For example, a contract program is about to fail, so the responsible management group comes together to examine the cost structure of the underlying contract and renegotiate the contract with the customer, with the goal of reversing the situation. While this stretch goal is being targeted, the management group can be considered

a team. Once the goal has been achieved, the group goes back to business as usual, at which point the group can no longer be considered a team.

From a practical perspective, senior executives cannot devote much time to a single topic, and so cannot participate fully in a team project. However, it is possible for a smaller number of executives with a keen interest in a particular goal to set aside the requisite time to see a project through to completion. Thus, it is more common to see very small team sizes in the most successful management teams.

Customer Account Teams

A customer account team is drawn from multiple disciplines within a business, and focuses on the relationship with one key customer. These teams are useful when dealing with very large customers, or customers whose orders have the potential to increase significantly in size. The teams can be used in any industry – for example, for banking services, auditing services, and manufactured goods.

The purpose of a customer account team is to provide a coordinated response to a customer. This response can take different forms, depending on the relationship. For example, if a customer has a problem to be solved, the account team acts as a knowledgeable solution provider. Or, the team could act as a strategic advisor, working to anticipate the future needs of a customer. In both of the examples, the team takes on the role of an expert, which means that it must be staffed with highly experienced and/or highly trained individuals.

Customer account teams may operate under extreme time pressure, since customers can have specific problems that must be resolved at once. However, the problem may not be well-defined, so the team operates under the additional pressure of having to clearly identify the issue and then formulate a solution. In addition, the members of this team will likely remain in contact with the customer throughout any resulting implementation phase, acting as the interface between the customer and the selling entity's functional departments.

Types of Team Players

An effective team requires different types of people on its roster. At a minimum, several people must have a strong orientation toward gathering the information needed to reach decisions. These people tend to operate at a very detailed level, are well organized, and have an authoritative level of expertise. They are frequently considered to be subject matter experts, and tend to be impatient with any inefficiency within a team (such as overly long meetings). An example of this person is someone who routinely monitors competing products being released by competitors, and who can readily cite the features of each one. If a team is overloaded with this type of individual, there will be a tendency to lose sight of the team goal, so the deliverable is different from what is needed.

Others fill a collaborator role, in which they can shift among different tasks as needed by the team in order to achieve the goal. These team members are more likely to operate at a higher level than the data gatherers (being fixated on the team goal), and may also be uncomfortable in dealing with an excessive level of detail. They can be expected to remind everyone concerning the tasks that must be completed in order to reach the goal. An example of this person is a consulting manager who collates multiple copies of a major proposal in order to ensure that a client receives it by a designated deadline. Collating is well below the manager's skill level, but she knows the deadline *must* be met. If there are too many collaborators on a team, there is such a focus on great planning that the actual work is never done, or technical challenges are ignored.

At least one person should be concerned with team processes. This individual has a flare for consensus building, facilitation, and conflict resolution, and is likely to engage in numerous informal discussions to improve the level of communications within a team. Process-oriented people are more likely to have excellent listening skills, so that they can more fully understand the positions of other team members. This person may be the team leader. Many process-oriented people on a team can result in a happy group that has accomplished little.

Introduction to Teams

And finally, there should be someone who challenges the team, questioning its assumptions, goals, and work methods. This last type of individual might not be considered a “team player,” and yet is a valuable member of the team, since the questions raised can be used to focus a team and ensure that its work product is improved. This person wants the team to succeed, and is willing to be quite vocal about any issues he sees that could interfere with attaining the ultimate goal. There are few people with the moral backbone to challenge the rest of a team, and so there is unlikely to be more than one on a team. In those rare cases where there are several of these people on a team, deadlines are rarely met because the group is spending too much time exploring problems.

The ideal team contains at least one of each of these types of team players, since each one complements the work of the rest of the team. If there is a concentration of one type in a team, the results will be sub-standard. The following example illustrates the concept.

EXAMPLE

Norrone Software has never used teams in the past. The company president concludes that there is a need to produce an entirely new on-line software model, and decides that this is the best possible time to try out the team concept. The management group decides that the ideal team should be stuffed with the best programmers that the company has, so it assembles the top six in the company, gives them a goal, and sends them off to code.

Six months later, the team delivers a product. The specifications of this product vary from what they were asked to write, because no one was concerned with matching the code to the specifications. Also, the delivery is two months late, because the team wasted time bickering over which coding logic to use – no one was comfortable with conflict resolution. Once the product went into operation, it crashed repeatedly, because the software was not designed to withstand high volumes of users. This issue might have been discovered by someone who was good at challenging team assumptions.

In short, the project failed because the team consisted of only one type of team player. If people with the missing skill sets had been added, the project would have had a much better chance of success.

It is all too easy to form a team that does not contain the proper mix of team players, since the person doing the choosing likes to recruit people who have similar styles to that of the recruiter.

The Optimum Number of Teams

When teams are treated as the “flavor of the month” management method, there can be a tendency to roll out a large number of teams within a short period of time. This can be a major problem, especially in regard to properly staffing each one with the different types of team players noted in the last section. There may be few people with the skills to effectively gather information, or engage in collaboration, or deal with processes – and there are very few people with the backbone to routinely question what the rest of the team is doing. Because of these staffing shortages, it is quite likely that some teams will be overstaffed with one type of person and understaffed in other areas, resulting in teams that do not function properly.

Given these concerns, a better approach is to roll out teams at a slow pace, identifying those individuals most suited to operating in a team environment, slotting them into teams, and using coaching to fine-tune their performance over time. The result is likely to be very long rollout period that spans multiple years. By the end of that time, management will likely find that only a small number of fully-qualified teams can be used.

Scaling Issues

A business may decide that it wants to employ teams to a greater extent, but is not sure how to determine the optimum number of teams. This is a particular problem in large organizations where there are opportunities for improvement scattered around dozens of subsidiaries. The senior management team wants to gain from the benefits of team-based solutions, but realizes that creating a massive number of teams can lead to chaos, especially when the many teams are interfering with the ongoing operations of the business.

One way to scale up the number of teams is to create an initial cluster of teams, perhaps within a small number of subsidiaries, and gather information about the resulting value created, as well as the constraints faced by these teams. This information can then be used to develop a cost-benefit analysis to see if it makes sense to engage in a further expansion of the number of teams. The management team also needs to decide how it can break down any constraints found by the first group of teams, thereby making it easier for the next group of teams to operate. A further concern is whether the company has a sufficient number of talented people to staff teams. It is quite possible that staffing constraints will impose a hard cap on the number of teams that can be supported.

Another way to evaluate team scaling is to compare the results generated by the existing group of teams to each incremental wave of teams being added. On the assumption that the earliest teams are given the most cost-beneficial projects to complete, it seems reasonable that later teams will generate somewhat lower returns, until the point is reached at which it is no longer cost-beneficial to add any more teams. A standardized measurement system is needed to make this evaluation process work, so that all teams are evaluated in the same way.

Summary

In this chapter, we defined a team, noted when it should be used (or not), and the types of teams that may be assembled. Of particular concern is the need to staff a team with people having specific characteristics. When a team contains the perfect blend of members, it can achieve excellent results. Conversely, a staffing imbalance can ruin a team before it has started work.

In the following chapters, we address more specific team topics, such as team development, team management, the team decision making process, and the diversified team.

Review Questions

1. The following is an example of a work group:
 - a. A customer account team
 - b. A group formed to make a recommendation
 - c. The accounting department
 - d. A product design group

2. The following environments are not conducive to the formation of teams, except for:
 - a. There are a large number of functional silos
 - b. A business is not generating any profits
 - c. There are a large number of union work rules
 - d. Managers seek out the opinions of others

Chapter 2

Team Development

Learning Objectives

- Specify the issues experienced by ineffective teams.
- Recognize the characteristics shared by the best team members.
- Specify the impact of team size on a team.
- Understand the value and concerns associated with each type of communication method.
- Specify the characteristics of an effective team.

Introduction

There are many factors to consider when assembling and fostering a high-performance team. It must include the right mix of people, have a high level of emotional intelligence, and be able to deal with the inevitable conflicts that will arise as the group works toward the resolution of a problem. These and other issues are discussed in this chapter, with the overall intent of providing a view of how a team is developed in order to maximize its capabilities.

The Purpose of a Team

A team can represent a significant investment of funds. Not only are people being taken away from their normal jobs to fill spots on a team, but the business may also be hiring temporary workers to replace these people while the team is in existence. Thus, a team may represent a significant out-of-pocket cost, or at least an opportunity cost related to the work that team members *could* have been doing elsewhere. If the managers of a business were to invest this amount of funds in a fixed asset, they would most certainly discuss the reason for the investment.

The same reasoning applies to teams. There should be a clearly defined vision for what a team is expected to do, and when its task will be completed. For example, a team may be expected to reduce costs in the sales department by 20%, or develop a new product within a specific cost range, or recommend a 5% headcount reduction. This should be a strongly compelling purpose that energizes the team. Further, the expected cost of each team should be matched against its expected benefits, so that management can properly evaluate the return on investment.

Once a purpose has been clearly articulated, write it down, along with all related goals and timelines. The output should look like an abbreviated form of a business plan. This document becomes the basis upon which a team is created, developed, and managed.

Issues Impacting Ineffective Teams

Before we discuss the development of a team, it is useful to first make note of the many ways in which a team can go wrong. By doing so, the many development steps noted in the following sections may make more sense – a large number of team development actions are needed to ensure that poor team results do *not* occur. Here, then, are some issues that may cause a team to be ineffective:

Personnel related:

- The team is overstaffed with people who all have the same team style
- Team members are not completing their assigned tasks, or are delivering late

Team Development

- There are personality clashes between team members
- Sub-groups form within a team that ignore or downplay the results of the rest of the team
- Team members do not address the inappropriate behavior of another member
- There is a great deal of talk, but little action

Management related:

- There is a team member (usually the team leader) who dominates the discussion and sets the agenda
- The team leader does little to manage the activities of the team
- Information is hoarded, rather than being freely distributed through the group
- There is no clear sense of a team's goals
- The roles of the team members are not clear
- After a meeting, there are complaints about how it was run
- There has never been a review by the team of how it is functioning

Support related:

- A newly-assembled team finds that certain skill sets are missing
- A team does not have sufficient funding or personnel to achieve its goals
- Outside parties that will be impacted by the team's results do not assist its efforts

It is entirely possible that a team will be afflicted with several of the preceding issues at the same time.

A business may be quite settled in its ways, with procedures that have not been substantially altered in years, and where everyone has carved out their own niche. In this environment, the creation of one or more teams to "improve" matters might be a cause for alarm among those who do not want change. If this is a large group or is placed in critical jobs, there may be so much resistance that a team is effectively blocked from ever succeeding in its assigned task.

Given the number of issues that could impact teams, the development of teams encompasses many topics, which are addressed in the following sections.

Identification of Team Members

One of the most crucial steps in team development is to select the right people for a team. It is possible to modify a person's work characteristics after he joins a team, but it is much easier to look for certain traits in the interviewing process.

The ideal team members are those that have energetic conversations with one another, carry on side conversations within the team, and pull in information from outside the team to support its operations. In particular, the ideal person actively circulates, engaging in brief, high-energy discussions; a key outcome of these talks is that ideas rapidly flow through a team. When staffing a team, one should search hard for these characteristics in prospective team members.

Another useful characteristic for a team member is the ability to learn. A team may be assembled that has a broad mix of skills and experience, but it is likely that this group will encounter an obstacle for which it does not have the requisite skills. If so, at least some members of the team must be able to learn additional skills while in the midst of completing a project.

In addition to communication skills and the ability to learn, at least some team members must have the technical skills needed to achieve the desired output. Thus, a product design team needs engineers, while a market analysis team needs people with financial analysis skills.

Team Development

Tip: Involve existing team members in the selection of additional team members. Doing creates a shared sense of purpose within the team. However, only involve them in the selection of the top candidates, so that they do not spend too much time in the interviewing process.

Another consideration is the diversity of the team. Groups with more diverse members tend to arrive at more creative solutions. These groups engage in deliberations for a longer period of time, because they are dealing with a wider range of perspectives. Also, members of diverse groups are less likely to automatically trust the statements of their fellow team members. Conversely, homogenous groups are more likely to arrive at mistaken conclusions, because they tend to trust the opinions and conclusions of others in the group, even when those opinions and conclusions turn out to be wrong.

What we did *not* mention as ideal team characteristics were the talents of specific individuals, or their prior accomplishments. These factors have minimal impact on team success, and could even have a negative impact if a very talented individual does not have the ideal team skills just noted.

Which characteristics should block a person from being assigned to a team? In essence, anything that impedes team communications. These negative characteristics include the following:

- A tendency to cut off the conversations of others
- An over-reliance on texting or e-mails to communicate
- Is too quiet to be heard clearly
- Only communicates with a small number of other people
- Wants to dominate conversations

Tip: There are cases in which certain employees are too valuable to lose, but are absolutely not team players. If so, it can be acceptable to deliberately exclude them from teams, while keeping them informed of team proceedings on the side.

Team Sizing

When forming a team, a common flaw is for it to be too large. When a team is too large, it is excessively difficult to gain agreement about goals and objectives, maintaining communications amongst all members is time-consuming, and there is a good chance that some participants will loaf, hiding behind the work of others. Despite these issues, a large team may be assembled for a number of reasons, including:

- *Politics.* Inter-office politics mandates that certain individuals be added to a team, even though they lack the basic characteristics needed to be effective team participants.
- *Silo representation.* There may be many functional areas in a business, and the manager of each one wants to have a representative on the team. While this approach can be viewed as breaking down silos by increasing communications, it may also result in people being added to the team who are really representing the interests of their bosses, and who may oppose the objectives of the team.

Ideally, a team should have fewer than 10 members. Usually, the ideal number is substantially less than 10. Setting a policy to limit the size of a team gives the responsible manager an excuse for not allowing stray employees to be added to a team.

Tip: When there is a request to add a person to a team, ask what unique value the person brings to the team. If the person has no unique value, then this should be valid grounds for resisting the addition.

The Statement of Work

When a team is initially formed, it should immediately create a statement of work (also known as a project plan). This document acts as a roadmap for the team, stating where it is going and how it will get there. The main elements of a statement of work are:

- The problem that is being addressed
- The goal or purpose of the team, and the desired outcomes
- The due date, and any milestone dates prior to the final due date
- The monetary, personnel, and other resources required to meet the goal and due date

The statement of work is a critical document, for it defines all subsequent activity. Thus, it may be necessary for the team to work through several iterations of the statement to ensure that all issues have been considered, and that there is a consensus in the team to support the statement.

The statement of work can be broken down in detail, so that the tasks to be completed are clearly defined. By drilling down deep into the statement's requirements, each member of a team knows exactly what he or she is supposed to accomplish, which makes it easier to manage the team.

Team Structure

The manner in which a team is organized can impact the level of communication within the team, and therefore its effectiveness. For example, a team is organized into a hierarchical structure, where one manager is in charge, with a subordinate assigned to oversee a sub-set of the responsibilities of the manager. In this situation, there is a strong tendency for the manager and the designated subordinate to issue orders, without considering the views of the other people on the team.

A better approach is to train the designated team leader in coaching skills, so that the actual team structure allows for group decision making. This approach opens up the level of communication amongst the team members and enhancements the level of engagement, thereby increasing team effectiveness.

Team Direction

The number of views of what a team should be doing may be matched by the number of people on the team. If so, the team will be extremely inefficient, since most of the team is working on tasks that do not necessarily coincide with the actual direction that management wants the team to follow.

To get around this issue, the team leader should assemble the group at the beginning of a project and thoroughly discuss the proposed direction of the team. This may result in some adjustments to the original direction, based on the input of the team. Thereafter, the agreed-upon direction must be continually stated to the team, so there is no question about what the team is supposed to do. Then, as team participants deal with day-to-day issues, they can make their own judgments based on the stated team direction, so that no one diverges too far from the plan.

Over time, circumstances may dictate that the direction be altered. For example, funding issues may impose a constraint on what the team can realistically complete. If so, the team should again assemble to discuss the alteration, after which the team leader ensures that the revision is clearly stated, and is regularly reinforced with each participant.

Tip: An important part of defining a team's direction is to clarify team boundaries. Doing so tells team members which areas the team will *not* address. The team leader may need to bring up these boundaries repeatedly, as part of any conversations about altering the team direction.

Work Assignments

As just noted, the team leader calls a meeting of all team members when the team is initially assembled, and discusses the direction of the team. Once the direction has been settled, the team must decide which members will work on which tasks. To do so, the participants need to share their skill sets with everyone else on the team, so that the group can judge which person is the most viable candidate for a particular job. It is quite possible that one person is the best candidate for multiple jobs; if so, the group needs to decide which task is the best choice for that person, and farm out the remaining work to other, less qualified candidates.

Once all work assignments have been made, the team leader monitors the progress of each person toward task completion. When a person is about to complete a job, the leader re-assembles the group to discuss which remaining tasks can be shifted to the individual in question. The discussion may result in a more general reappraisal of work assignments. By using the entire group for this discussion, it is easier to obtain buy-in regarding the ongoing apportionment of work assignments.

The Work Load

When assigning work within a team, it is not sufficient to pile all of the work onto a few people, and then have everyone else review the outcome. If this approach were followed, those individuals tasked with the bulk of the work would feel put upon by the rest of the group, which hardly contributes to the overall sense of purpose of the team.

Every member of a team must contribute a concrete amount of work to the overall effort. Doing so creates a general feeling that everyone is pulling together toward a common goal. This means that the team leader cannot be seen as simply assigning work and checking off progress on a Gantt chart – this person must complete some visible amount of work that clearly contributes to the goal of the team.

Team Transitions

When a team is formed, it does not usually leap into action, blazing through all assigned tasks at the speed of light. Instead, there is a ramp-up period during which there is likely to be little progress, and even declines in progress. The ramp-up period can be divided into the following segments:

1. *Introductions.* When a team is first assembled, a number of the members may not have worked together in the past. If so, some time will be required for them to chat informally, discuss their relative skill sets, and take other's measure in regard to working styles. This process will go on for some time, since certain characteristics of individuals may not be immediately apparent. For example, a team member may be put under a tight deadline several months into a project, and reacts by lashing out at the other members. This behavior would not have been immediately apparent if there were no difficult deadlines earlier in the project.
2. *Settling in.* Once the initial feeling-out process is complete, the team members settle into their roles. This is hardly a one-day event; instead, there is a certain amount of jostling among the members to establish exactly who will do what.
3. *Coming together.* Once the team has settled, it can turn its group focus on the team goal, and begin engaging in high performance behavior.

When viewed from the perspective of the team leader, it is apparent that these team transition phases must be accelerated in order to reach the maximum potential of the team as soon as possible. This means engaging most closely with the team during the earliest stages, intensively monitoring their interactions and stepping in where needed to increase the flow of information among the group and more clearly defining roles and responsibilities.

Communication Systems

When organizing a team, keep in mind the communication systems being used, since some forms of communication are more valuable than others. In essence, face-to-face, highly visual forms of communication convey more information, and so are to be encouraged. Ranked in declining order of value, communication methods are as follows:

1. Face-to-face
2. Videoconferencing
3. Telephone
4. E-mail
5. Texting

In addition, the amount of information exchanged declines if more people are involved, since there is less engagement by team members when they perceive themselves as not being necessary to a discussion. Thus, a two-person, face-to-face discussion will result in a much higher quality of communication than a “copy all” e-mail.

When a team has a crisis, there is a much higher tendency to use face-to-face interaction to resolve the underlying problems. This is appropriate behavior, but management frequently ignores the fact that the crisis was caused by an initial reliance on lower-grade forms of communication (such as e-mail).

Collaboration Issues

A team functions best when its members collaborate as closely as possible. The trouble is that people are much more likely to collaborate when they perceive other team members as being similar to them. The “similarity” concept can apply to many factors, such as age, level of education, and nationality. Further, collaboration is even more unlikely when the people assigned to a team do not know each other. Yet another concern is that team members who are specialists tend not to collaborate, instead displaying a strong tendency to support their own views. These blocks to collaboration can be overcome by engaging in the following activities:

- *Minimize the number of strangers.* When selecting people for a team, ensure that a significant proportion of the selected group already knows each other.
- *Train team members.* Provide mandatory training to employees prior to the start of a team assignment, where they receive instruction in conflict resolution, project management, engaging in targeted conversations, and appreciating the views of others.
- *Coach team members.* The team leader constantly monitors the interactions of the team, and steps in to provide coaching when there is a clear lack of collaboration.
- *Define roles.* Each team member should be given a clearly defined role at the start of a project. By doing so, there is less room for participants to bicker over who will be assigned to which task.
- *Senior management sets the example.* The senior management team must be seen to collaborate with each other on a regular basis. This means that managers travel to company locations extensively, routinely fill in for each other at various events, and are generally seen *not* to encourage silo-based behavior in the business. When the rest of the company follows the example set by senior management, they are more likely to develop informal networks throughout the business. This behavior can be valuable when team members call upon their networks to assist with team problems.
- *Instill a general culture of collaboration.* The members of a team are more likely to collaborate with each other when the organization as a whole already embraces collaboration concepts. For example, mentoring can be encouraged throughout the firm. Also, managers can sit with new hires and identify who they should contact to build their own informal networks within the business, as well as allow for sufficient time to build these networks. Management can also design company facilities to facilitate interaction, such as large meeting areas and in-house dining facilities.

A deceptively simple way to foster collaboration is to encourage team members to eat meals together. Doing so substantially increases their time interacting with each other, which is not necessarily what happens when they return to their cubicles and offices after lunch.

Team Emotional Intelligence

Emotional intelligence is the ability to recognize different types of emotions, and to use this knowledge to guide one's decisions and behavior. In essence, emotional intelligence is the ability to relate to others. When this concept is prevalent throughout a team, its members feel that they work better as a unit than individually. To fully take advantage of emotional intelligence, the following must be present in a team:

- *Identification with the team.* Every member of a team must strongly identify with the rest of the group. This is to say, they are more than happy to announce to outsiders that they are part of a team. This is more likely to occur when a team has a strong sense of purpose, clearly identified roles and responsibilities, and pride in what the group does. A strong sense of identification tends to build energy within a team to overcome obstacles.
- *Strongly motivated.* The team is strongly committed to putting all possible resources into the team goal, because they feel a real need to accomplish the goal. Each member of the team will push the others along, so that the team as a whole retains a high level of focus. A high level of motivation generates the thrust needed to see a project through to its conclusion.
- *Emotionally aware.* Team members understand what they and others on the team are feeling, and how to respond. They are comfortable discussing their feelings, and can make a skilled response to the emotions of others. A strong sense of emotional awareness allows a team to continue working together through many types of upheaval.
- *Strong communication skills.* All team members can accurately assess the feelings of everyone else on the team, and know how to respond, both verbally and nonverbally. This group understands that e-mail is a poor form of communication, preferring instead to communicate in person.
- *Tolerance for tension.* The team can readily deal with differing types of tension-causing events that may occur from time to time. This means getting to know how each person deals with stress, and acting decisively to provide assistance when the stress level is clearly too high or heading in that direction. The team is also good at using humor to reduce the stress level.
- *Ability to resolve conflicts.* The team is able to work together to resolve conflicts. Ideally, this means hearing out all concerned parties and jointly working toward a resolution that all members can support. Team members can readily accept critiques. Thus, conflict is dealt with openly, with the goal of reaching a constructive settlement.
- *Remains optimistic.* The team is satisfied with its progress to date, and believes that the team goal will be attained. With this attitude, members are more likely to persevere in the face of difficulties. Even if the current situation does not meet expectations, the team believes that it will still succeed in the end.

Emotional intelligence can be built into a team to some extent by screening for this ability when initially selecting team members. By doing so, there is an increased likelihood that team members will collaborate with each other in an effective manner. However, it is not so simple to “install” emotional intelligence in a team, because this concept does not just relate to interactions between team members. In addition, a team *as a whole* can experience emotions. Further, a team must be aware of the emotions of the individuals and other groups with which the team has relations. Thus, there is a higher level of complexity within a team when dealing with emotional intelligence issues. This complexity (and the associated risk of failure) can be dealt with in the following ways:

- The views of each team member can be solicited prior to making key decisions.

Team Development

- Tell team members that they are valued. Avoid derogatory comments.
- When team members fall short on deliverables, constructively point out the issue, and tell them that the team needs their services.
- Acknowledge when members are upset, and show them proper respect.
- Focus on problem solving, rather than blaming others for failures.
- Periodically have the team examine its own effectiveness. Also, ask the recipients of the team's efforts to evaluate the team. Further, benchmark the team's performance against the standards of other teams.
- Deliberately foster outside links with those parties that will be impacted by the team's actions. Invite these people to team meetings and encourage them to express their views.
- Develop a clear understanding of the political and social context within which the team is operating.

EXAMPLE

The engineering manager of Pianoforte International is added to a team that the company president is forming to investigate the causes of recurring product failures related to the keyboard. The engineering manager proves to be quite a difficult team member, as his only contribution in team meetings is to point out why proposed actions will not work. Luckily, the entire team has received training in identifying issues of this nature, and realize that the engineering manager is being defensive – he perceives that the team in digging into the reasons why his products do not function properly. They carefully point out that the team exists to supplement his design efforts and create an even better piano product.

EXAMPLE

A product design team has been formed at Ninja Cutlery, to explore the possibility of developing a new super-sharp blade for professional chefs. The team discusses the impact its design efforts will have on the various company departments, and sees that the procurement manager might be annoyed if the team finds an alternative supplier that offers the needed steel blades. Accordingly, one of the first steps taken by the group is to assign one of its senior staff to build relations with several people within the procurement department, including the procurement manager.

EXAMPLE

A team is reviewing the manufacturing process at Milagro Corporation to see where costs can be cut. The team is comprised of six members, and five of the group vote in favor of proceeding with an assembly line reconfiguration that will reduce the amount of work-in-process inventory. The one holdout notes that the reconfiguration could potentially increase the number of units that are damaged during production. The team could simply override the vote of this one person, since there is a super-majority in favor of the change. However, the team has a high degree of emotional intelligence, and instead perceives that the one objector is quite distraught over the vote. They pause to hear his complete explanation of the issue, to ensure that all possible perspectives have been adequately discussed.

EXAMPLE

A product development team at Artisan's Delight is using a brainstorming session to come up with new products that incorporate the company's esthetic for home-manufactured, hand woven woolen products. One suggestion is to produce nose warmers, which is immediately met by a joking put-down by Mr. Jones. Since the rules of a brainstorming session are never to criticize suggestions, the rest of the group immediately pelts Mr. Jones with white board erasers. By doing so, the group uses a fun approach to provide

Team Development

immediate feedback that Mr. Jones broke the rules. If they had not done so, he might have continued to make negative comments that might have kept others from providing additional suggestions.

EXAMPLE

A product design team at Finchley Fireworks is developing a new Strato Burst launch booster that hauls payloads 50% higher than the existing booster. A key member of the design team has trouble getting started in the morning, and so is habitually late to the morning kickoff meetings. Other team members are aware of her issue; rather than exploding over her most recent absence, one of the team calls her at home and says “Why are you still at home – we need you here!” The caller conveys the message that she has overstepped the rules of the team, but also that her contributions are needed.

In the last example, the team chose to engage in constructive confrontation. If the person had continued to be late for meetings, the problem might have festered. Instead, it was addressed in a forthright manner.

Emotional intelligence is displayed in different ways by introverts and extroverts. An extrovert is more likely to verbally think through all aspects of a problem; in the course of this chatter, an extrovert might say something that damages relations within a team. Conversely, an introvert is more likely to delay or entirely avoid a team interpersonal problem, which allows it to fester for an extended period of time. Also, an extrovert is more likely to move quickly toward a solution, not taking into account the opinions of those team members who are less willing to make their feelings known. An introvert is more likely to sound out team members, but this can result in a protracted decision-making process. Given these differences, introverts and extroverts should be aware of their own tendencies, and try to mitigate them while working within a team.

Team Engagement

The most effective teams are those in which there is roughly the same level of engagement between each pair of team members. For example, if there are four people in a team, the level of engagement can be measured as being between:

- Person A and Person B
- Person A and Person C
- Person A and Person D
- Person B and Person C
- Person B and Person D
- Person C and Person D

If the energy level between any of these pairings is reduced, then the communication level declines, as does the effectiveness of the team. A common outcome in a team is that there are a few pairings where the level of engagement is quite high, but other pairings engage in minimal communication. The effectiveness of these teams is reduced in proportion to the reduced level of team engagement.

From a management perspective, then, it is useful to observe the levels of interaction among all of the team members. Whenever there is a weak pairing, consider forcing these individuals together during socialization events, or perhaps by assigning them joint tasks.

Team Training

There are certain types of training that can show people how to be effective members of a team. The emphasis of this training is on working together, rather than the more traditional training that emphasizes the enhancement of personal skills. Examples of team-oriented training classes are:

Team Development

- How to create a team goal and a linked plan for achieving the goal
- How to discern the positions of others by listening to them
- How to make decisions as a group
- How to participate in and run a productive team meeting
- How to resolve issues by focusing on the problem, rather than other team members
- How to state a position succinctly

Multi-Team Members

People who are considered to be subject-matter experts (SMEs) may be called upon to serve on more than one team at the same time. This occurs when several teams are working toward adjacent goals, where the expertise needed by each team includes some common elements, and especially when an expert is only needed for a short period of time on each individual project. When there is a multi-team member, the following additional complexities can result:

- There are conflicting work priorities, since the SMEs are working on tasks for several teams at the same time.
- It is more difficult to schedule meetings, since the SMEs can be called into meetings for other teams.
- It is more difficult to build rapport among the team members when the SMEs cannot attend face-to-face or videoconferenced meetings.
- Those people splitting their time among multiple teams are more likely to experience stress, fatigue, and burnout.

There are several ways to deal with these issues. Consider the following options:

- Have team leaders coordinate their planning efforts whenever there is joint SME usage across their teams.
- Build some buffer time into the team schedules for SMEs, so that they are not overwhelmed by the work load and sense of constant crisis as they travel from team to team.
- Designate some teams as high priority, so that SMEs cannot be pulled from them, even when there is a crisis on another team. This designation should only be used when a project is contributing to the strategic direction of the firm.
- If multi-team members are not essential for a meeting, exclude them from the meeting.
- Cap the number of teams on which a SME can serve, so that their efforts are more tightly focused.
- Move SMEs outside of the team environment, so that they are only called upon for advice; they do not have to spend any additional time interacting with a team.

Backup Planning

When a team has one person who has specialized knowledge, there is a risk that the team will fail if this person leaves. When a team is only expected to be working together for a short period of time, this may be considered a reasonable risk. However, when a team is expected to be in operation for a long period of time, the team leader should consider planning for a backup person who can fill in. There are several possibilities for developing a backup person, such as:

1. Have the specialist prepare a manual or checklist that itemizes all of the activities that must be performed, and how to do them. This may include a calendar of events and detailed procedures. Preparation of a comprehensive manual can require a large time investment, so in many cases only a simple checklist may be prepared.
2. Identify another person on the team who is willing to act as a backup. Then create a training schedule for when the specialist will provide training. This should include a listing of which topics will

Team Development

be covered in each successive training session, so there is a clear understanding of how long it will take for the backup to be properly cross-trained.

3. Have the newly-trained backup person engage in actual activities while being supervised. The intent is to test for the backup's level of comprehension of the training materials. Depending on the outcome of the test, provide additional training as needed.
4. Schedule the backup person to engage in regular refresher training, as well as to fill in for the specialist whenever the specialist is on vacation or otherwise not available.

Conflict Resolution

A team needs to engage in constructive conflict in order to fully evaluate alternative courses of action. Unfortunately, many teams avoid conflict by settling too quickly upon one outcome. When this happens, they choose a course that may turn out to be suboptimal, or even one that has serious shortcomings.

There are ways to create a working environment in which conflict resolution can be conducted without causing serious interpersonal problems within a team. A mix of the following solutions can create an environment in which alternatives are addressed without causing permanent damage to a team:

- *Set a common goal.* Be sure that the team is entirely in agreement on the goal being pursued. When this is the case, everyone understands that there may be arguments about how to achieve the goal, but they all want to get there. With this focus, arguments are less likely to turn in a personal direction.
- *Argue based on facts.* Collect as many facts about the situation as possible, rather than arguing based on opinions. If there is a conflict that is based on limited or no information, then pause the discussion until more information is available. If opinions are used instead of facts as the basis for decisions, then arguments will focus on the people supporting an opinion, which quickly leads to interpersonal conflict.
- *Create additional options.* When the team deliberately increases the number of options under consideration, it gives the group a broader range of alternatives, which allows people to spread their support more broadly. When there are only two alternatives, support tends to harden quickly around them, which can lead to politicking in favor of one or the other. When choices are added, the team is more likely to focus on the process of developing alternatives, rather than choosing sides.
- *Have a fair process.* The process used to arrive at decisions must be perceived as being fair. If not, those people whose positions are rejected may perceive the process as being deliberately skewed against them. Unfair decision processes usually involve a strong team leader who autocratically makes final decisions. In this situation, the team is more likely to switch to politics to influence the decisions of the leader. A better approach is to use consensus as much as possible, and to defer to the decision of the most relevant manager when a consensus cannot be reached, and especially when there is a deadline for the decision. This latter approach ensures that everyone on the team can participate in and influence the final decision, even if the actual decision goes against their preferred outcome.
- *Introduce humor.* When a team can include humor in its interactions, it defuses the stress associated with making decisions. It also puts people in a more positive frame of mind, which tends to minimize their levels of defensiveness.

Conflict is a necessary part of a team, since it allows the group to sift through a number of alternatives. The trick is how to handle conflict so that it does no lasting harm to the team members and their relations with each other. When handled properly, team members still feel that they have been given a voice in the process, and so will be more supportive of the direction taken. Further, the decision-making process is more likely to have considered a range of options based on factual information, resulting in better decisions.

Dealing with Counterproductive Behavior

Sometimes, a person is engaged in behavior that is seriously counterproductive to the team. This could involve, for example, a constant stream of complaints, low-quality work, opposing the team plan, or making disruptive outbursts. Since teams are generally small in size, just one person engaged in such behavior can destroy the cohesiveness of the team. While the most obvious solution is to kick the person off the team, the situation may be recoverable by engaging in some intensive listening to see if the individual has concerns that may be valid. While the person's behavior may be quite inappropriate, the underlying reasons could involve issues that are worthy of consideration. For example, if a product design team is proceeding with a design that might contain a safety issue, a team member could become frustrated that no one is addressing his concern, and so elects to oppose further progress on the design by delaying his contributions to the work.

Irrespective of the information found by hearing out the person, the indicated problems must stop. To do so, work with the individual to develop benchmarks for proper behavior, ask if any support can be provided to encourage this behavior, document the resulting action plan, and give a copy to the person. Then have periodic meetings to discuss changes in the person's behavior. These actions may not ultimately convert the person into a productive team member, but in some cases the extra effort can do so.

Internal Conflict Resolution

The team leader does not want to be placed in the position of constantly having to settle conflicts within the team. When this happens, the process takes an inordinate amount of time, and the team members may not be pleased with the resolution, which reduces the authority of the team leader. Instead, consider training the team to settle their own conflicts. Doing so not only clears a large item from the work list of the team leader, but also makes team members responsible for their own solutions. There are several ways to assist in this transition, which are:

- *Teach skills.* Employees are bad at conflict resolution, because they have never received any training in it. This problem can be remedied by going over the basic principles of defining the facts of a situation, mutually laying out possible solutions, and agreeing to changes. It may be necessary to bring in a neutral third party to conduct the training, and to use role playing so that individuals can practice the process.
- *Set an example.* The team leader should strongly favor in-person meetings to text-based communications, and avoid criticizing outsiders or management. This sets an example for the rest of the team, which may emulate this behavior.
- *Coach with queries.* When a team member brings up an issue concerning another employee, do not step in to settle the issue. Instead, coach them with queries regarding how the situation should be handled. For example:
 - Have you listened to the issues that she has? Do you understand them?
 - What steps have you taken to resolve the issue?
 - How would you phrase your concerns to the person?
 - What sort of solutions do you think would be acceptable to both of you?
- *Debrief.* Once a person has been sent off to settle a conflict on his own, ask for a short meeting afterwards to go over how matters went. The team leader may be able to give advice on some aspects of the matter, which can result in a more polished conflict resolution by the employee at some point in the future.

It will require a certain amount of time for these actions to take effect – quite possibly more than the team leader would need to directly settle internal conflicts over the short term. However, the long-term effect is

to remove many of these issues from the team leader, while also giving the team more confidence that it can handle them without any intervention.

Socialization Levels

The members of a team must have sufficient time to socialize amongst themselves. Otherwise, there is no chance for bonding to develop between individuals. Here are several ways to promote a higher level of socialization:

- *Coffee breaks.* Have entire teams take coffee breaks at the same time. This allows for much more personal interaction than allowing only one or two people at a time to break away from their work. This suggestion does not always play well with managers, who are wedded to the idea of maintaining a high level of efficiency by keeping some portion of a team operational at all times.
- *Meals.* Routinely take the team out to lunch. Further, if the group is working late, have a meal delivered to the company, and have the team eat together. The effects are the same as those just noted for coffee breaks.
- *Even communication flows.* All members of a team should speak and listen in roughly the same proportion, so that no one person dominates the discussion. Managers can monitor the situation and encourage those people to speak who have not been contributing. Doing so leaves less time for dominant speakers to talk, which diminishes their role in influencing a team.
- *Appropriately-sized meeting facilities.* The layout of a facility should allow a full team to more easily congregate. For example, if a team has ten members, then the tables in the break room should allow for all ten to sit around a single table. Similarly, conference rooms should be able to hold entire teams. Otherwise, some individuals will be excluded, which will naturally lead to the formation of sub-groups that do not communicate adequately with the rest of the group.

Innovation Issues

When the work product expected of a team is of the creative variety, it is more necessary for the team to establish a number of linkages outside of the team. By doing so, team members can draw upon the ideas and broader perspectives of an expanded group, which are then taken inside the team for further processing.

Some team members have a natural proclivity for the networking needed to collect information from outsiders. This being the case, the ability to establish connections should be one of the key characteristics examined when initially searching for team members for a creative team. However, these individuals spend so much time circulating outside of the team that special efforts must be made to ensure that they impart their new-found knowledge to other team members. For example, if a team member has established valuable outside linkages, but acts as an introvert within the team, the manager must make special efforts to ensure that the individual fully debriefs the team.

Basic Compensation

When it is time to engage in periodic compensation analyses, it is all too easy for department managers to forget about people who are away on team assignments. This can mean a missing compensation change, or the assignment of an average compensation increase, on the grounds that the manager does not know how the person has been performing.

The human resources department can issue notices whenever it sees that a periodic compensation change has been skipped. The more critical issue is how to ensure that team members do not suffer from low compensation treatment because of their participation in teams. One way to do this is for the team leader to write reviews on team members and discuss the reviews with supervisors. Another approach is to use an average compensation increase, but to layer on top of that an additional pay increase based on any skills acquired during a person's residency with a team. The latter approach works well when there is a clear need for a skills enhancement by team members in order to accomplish their designated goal.

Incentive Compensation

Depending on the circumstances, it may be entirely appropriate (and expected) to offer an incentive compensation plan to a team. It is especially useful when a tight deadline is being imposed, and the incentive is tied to making the deadline. Conversely, there may be no point in offering an incentive compensation plan when a team is expected to continue indefinitely, and there is no clear work product that is expected in the near future.

When it seems reasonable to offer an incentive to a team, the main point is that there is a clear linkage between the incentive and the triggering event. As long as the team can clearly see what they have to do in order to earn a bonus, then one can reasonably expect them to react in a positive manner. That being said, there are several additional issues to consider when creating an incentive compensation plan, which are:

- The amount of the potential payout must be large enough to get their attention.
- The bonus calculation must be simple to understand, so there is no question about the amounts that could be paid out.
- Do not include multiple targets that must be surpassed, since the team will soon figure out that the probability of achieving *all* of the targets may be quite low.
- If performance is above a minimum threshold, consider interim bonus payments to retain the team's attention.
- Use a sliding reward scale, so that the team earns some sort of bonus once a minimum threshold has been surpassed.

On what criteria should an incentive compensation plan be based? It usually should be closely linked to the work product of the team. For example:

- A team tasked with finding cost reductions is offered a bonus if it can find at least \$1,000,000 of cost savings and implement them.
- A quality assurance team is offered a bonus if it can reduce a company's product errors into the six sigma range.
- A software installation team is offered a bonus if it can complete the installation of all modules of a major production planning system by year-end.

EXAMPLE

Mole Industries, maker of trench digging equipment, has a team that is targeted at the installation of a new warehouse management system (WMS). The team has been assigned the task of installing all three modules of the system by the end of the calendar year, which is one year away. The chief operating officer (COO) is developing an incentive compensation plan for the team that focuses their attention on achieving a complete rollout by year-end.

The COO has concluded that it is impossible to tell if the team will meet its target at any point prior to the designated completion date, so there is no provision in the plan to pay interim bonuses. Instead, the plan involves three levels of bonus, which are:

- 10% is awarded if one module is installed by the due date
- 50% is awarded if two modules are installed by the due date
- 100% is awarded if all three modules are installed by the due date

Team Development

The plan is structured to give the team a large compensation boost if they can install the entire system by the due date, while still giving it some compensation if only one module is installed. The COO has concluded that as much of the system as possible must be installed by year-end, so she makes no provision in the plan for any payouts if modules are delayed.

EXAMPLE

Another team at Mole Industries is tasked with achieving 100% inventory record accuracy. The current inventory accuracy level is 25%. This is an extremely difficult target, so the team's incentive compensation plan is structured to provide payouts even if the accuracy level attained is significantly less. Accordingly, the plan provisions are:

- 80% record accuracy earns 100% of the incentive payout
- 90% record accuracy earns 120% of the incentive payout
- 95% record accuracy earns 140% of the incentive payout
- 100% record accuracy earns 200% of the incentive payout

The intent behind the compensation structure is to use a rich payout to push the team toward perfect accuracy, while still providing a reasonable payout for lower levels of accomplishment.

Team Rewards

In addition to the basic and incentive compensation systems paid to team members, also consider the occasional use of team rewards. These are usually low-cost expenditures that are intended to bring the team together to celebrate the completion of a milestone. For example, bring in pizza when the testing of a software module is complete, or buy cupcakes when inventory record accuracy reaches 80%. The point is to have the team celebrate successes all along the path that will eventually result in attainment of the team's goal. A string of successes motivates the team to keep driving toward the ultimate goal.

If someone has made a special contribution to the team, such as coming in on a weekend or devising a unique solution, recognize them individually with a separate reward, such as a gift card or movie tickets.

The High-Performance Team

In rare cases, an organization may need to form a team that is tasked with an extremely difficult goal, such as resolving a prospective lawsuit, fixing a major product flaw, or switching the core technology to a new platform. In these situations, only "A" level experts are used, in order to maximize the flow of ideas. The outcome can be radically different solutions that are delivered within highly compressed periods of time. Despite the potential benefits, organizations usually avoid loading a team up with experts, due to their irascibility, egos, and inability to work with others.

There are ways to improve the odds of creating a productive high-performance team. Given the nature of the team's participants, it is not guaranteed that the following recommendations will work – nonetheless, they create an environment in which great outcomes are more likely. The recommendations are:

- *Select carefully.* An "A" level expert represents a completely different personality type from the normal team member. This individual loves a challenge, wants to take risks, and operates well under pressure. Accordingly, look for these traits when selecting members for a high-performance team. If there are too many "B" level players in the team, they will impede the thought processes of the "A" people by not pushing them along, and by opposing the more radical innovations.
- *Feed their egos.* An "A" level person craves attention, so give it to them. This means publicizing the team's members, giving the group massive amounts of funding, and staying out of their way.

Team Development

By doing so, each person does not feel constrained, and knows that a successful group outcome will improve their reputation.

- *Pack them in.* Keep the team members in close proximity to each other. By doing so, they can continually interact, bouncing ideas off each other in face-to-face conversations. The outcome is a much faster pace of progress.
- *Manage differently.* There are several ways to manage a high-performance team. One approach is to be a perfectionist who demands excellence. Another option is to encourage so many viewpoints that the work environment is continually tumultuous. Under this latter approach, the flow of ideas is so continuous that each person has no time to be locked into his or her ownership of an idea, and so will instead support the best overall outcome. No matter what method is used, the team leader must continually reinforce the time constraints under which the team is working, so that the targeted deliverable will be achieved on time.

Given the intensity with which a high-performance team functions, it is rare for the group to stay together for very long. Instead, they will likely break up as soon as the team goal has been achieved, declining to stay together for other projects. This outcome is even more likely for “A” level experts, who are usually being bombarded with offers to work on other projects. Consequently, no matter how successful a high-performance team may be, do not expect its members to continue together on later projects.

It is quite difficult to find team leaders who can deal in the correct manner with a high-performance team. These individuals are likely to comprise quite a small subset of the total group of team leaders. Consequently, identify which ones are the most capable, and reserve them for use on high-performance teams. Otherwise, an inadequate manager might be assigned to a high-performance team and throw it into disarray.

Team Duration

How long should a team be kept together? The effectiveness of a team generally increases over time, as members gain more confidence in each other and strengthen their interactions. Consequently, it can make sense to keep the same group together over a long period of time, perhaps being tasked with an ongoing series of projects.

If the decision is made to keep a team together, it is likely that there will be some dropouts from the group over time. This may be caused by employee departures from the organization, transfers to other locations, and so forth. If so, a high level of effectiveness can still be maintained by committing to maintaining the highest possible percentage of existing team members within the group. By doing so, replacement team members can see how the large core group works together, and so is more likely to adopt the same work habits.

Conversely, it rarely makes sense to deliberately tear apart a team once its goal has been achieved, and assign them to new and different teams. Doing so essentially destroys the communications “capital” built up by the team over time, replacing it with new teams that must be constructed from scratch.

<p>Tip: Teams that have worked together for long periods of time tend to make the fewest mistakes, so if error reduction is a key goal, it makes the most sense to keep teams together.</p>
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Team Termination

Depending on the type of team, there may come a time when its purpose has been served and it is no longer needed. If so, the team leader has a duty to the organization as a whole to return the team members to their departments as soon as possible. By doing so, their work capacity is made available for other purposes. Thus, having a team linger too long is counterproductive. If there is an argument in favor of stringing out a team in case they are needed for any residual implementation issues, then at least release those team members from duty whose services for this purpose are considered to be minimal.

Team Development

A useful final project for the team leader is to forward to the human resources department an updated listing of the skills of all team members. Given the nature of a team, with the amount of cross-training and new skill requirements that routinely arise, it is quite possible that several members have greatly enhanced their skill sets. If the human resources department has this updated information, it can be used to direct individuals to tasks for which they are now suited. This is to the benefit of both the employee (who can now work in a more responsible position) and the company (which no longer has to conduct a job search for the position).

Keys to Team Success

In this chapter, we have discussed ways to assemble and develop a team. The concepts noted for each of these topics will improve the probability that a team will be successful. In addition, here are several additional tips for how to improve the probability of team success:

- *Budget for problem analysis.* Block out enough time in the team schedule for members to receive training in problem identification and resolution. They should be given skills in those areas where the team is most likely to encounter issues.
- *Budget for failures.* A team is bound to run into problems at some point, so include a generous amount of extra time in the team's timeline for issue resolution.
- *Stay small.* It is much easier to target a series of smaller goals than one massive one. Doing so also builds team confidence as a series of small goals are overcome, thereby improving its ability to tackle larger projects in the future.
- *Redefine the goal.* If a project has a long duration, it is entirely possible that the goal will change over time. If so, continually revisit the goal with the team, so that it can stay properly focused, rather than continuing down a path that is no longer needed.

The general thrust behind these tips is to anticipate problems (the first three items) and to recast the definition of success as needed.

Characteristics of an Effective Team

Near the beginning of this chapter, we noted the issues impacting ineffective teams. Now that we have addressed a range of team development issues, it is time to consider what an effective team looks like. The characteristics of an effective team can generally be described as a smoothly-functioning, highly-coordinated group. More specifically, its characteristics are:

- *Clear target.* Every member of the team can clearly enunciate the target on which the team is focused, as well as the plan for getting there.
- *Member diversity.* The team has been structured so that there is a mix of different types of team players within the group, which is intended to create a high-performing team.
- *Clear roles.* All roles are clearly defined, so that work is distributed fairly across the team.
- *Ongoing chatter.* The team is in constant communication with each other to discuss issues and possible resolutions. This implies both an ability to speak clearly and listen intently.
- *Strategically networked.* The team has determined which outside relationships need to be fostered so that the team's goal can be reached. The result is a network that is specific to the needs of the team.
- *Comfort with disagreement.* Disagreements arise, but the team is accustomed to dealing with these issues, so everyone is capable of resolving conflicts.
- *Consensus building.* There is an open discussion of the more important decisions, so that the team can arrive at a substantial level of agreement regarding a course of action.

Team Development

- *Internal reviews.* The team periodically assesses its own performance and implements changes to overcome any perceived issues. The assessment could include such topics as how to conduct better meetings, whether the ground rules of the team should be modified, and whether different forms of communication could be used for meetings (such as videoconferencing).

A team that displays the preceding characteristics is likely to have been well-trained in teaming principles, and also to have operated in teams for a fairly long time.

Summary

We have outlined a number of issues to be aware of when developing a team. Even if every one of these issues is dealt with in precisely the correct way, it does not mean that the resulting team will be one of the best-performing groups in the organization. There are still a number of imponderables that will trigger the emergence of an outstanding team. Consequently, the role of management in developing a team is really to create the conditions under which a great team *might* develop. From that point onward, it will be necessary to tweak a team's membership, information flows, interactions, meetings, goals, and so forth to create the best possible outcome.

Review Questions

1. The following segments are involved in the ramp-up period for a new team, except for:
 - a. Settling in
 - b. Electing officers
 - c. Introductions
 - d. Coming together

2. A team with a high level of emotional intelligence should have:
 - a. A strong level of introversion
 - b. Authority to kick conflicts up to the team leader
 - c. Identification with their home departments
 - d. Strong motivation

3. The following activities can be used to enhance conflict resolution:
 - a. Have a fair process
 - b. Argue based on the facts
 - c. Hire an arbitrator
 - d. Use humor

4. To achieve the best results, a high-performance team should be organized or managed in the following way:
 - a. Back off and let the team members work on their own
 - b. Spread them out physically
 - c. Publicize the members of the team
 - d. There should be an even mix of “A” and “B” players

Chapter 3

Team Management

Learning Objectives

- Recognize the different types of listening that a team member can employ.
- Identify the steps that can be taken to create a culture that favors teams.

Introduction

The management of a team requires a different skill set from what is used to manage the traditional department. Instead of a top-down hierarchical approach, the team leader needs to rely more heavily upon a coaching style that pushes decision making onto the team members. An advanced version of team management is self-directed teams, where team members share most management tasks. The concepts of management style, behavior, and skills are described in this chapter, along with several management tools. We close with a discussion of self-directed teams.

Management Style

A team leader cannot follow the classic approach of forming a hierarchical organizational structure and then dictating how a team will function. This is because the team members report to managers outside of the team, not the team leader. Given the absence of direct management authority, the team leader must rely upon other techniques.

When it comes to managing a team, there is no ideal management style. Instead, whoever is placed in this role should adapt his or her style to the circumstances. If a team has a mix of domineering and quiescent members, a likely management style will be to coach all parties to adopt a more even level of communication. If a team needs a wildly creative solution, the management style may involve coaching participants to search outside of the team for ideas. If there are seriously deviant individuals in the group, the most appropriate style might be to weed out those causing too much trouble, and shielding the remainder from organizational pressure.

It may be easier to define what the management style for a team should *not* be. The manager should not be a domineering sort who immediately imposes solutions on the team and then instructs them to go forth and conquer. This approach merely results in (figuratively) a king and a group of serfs.

If there is any single factor that should be present in a team leader's management style, it is the ability to focus on group processes. One should examine how the team is interacting, whether divergent views are being considered, and so forth, and provide timely nudges to direct the team toward a more optimal outcome.

Though we have just pointed out that no single management style is ideal for a team, there should be an emphasis on defining roles and objectives at the start of a project. The team leader should be very clear about defining the problem to be solved, and working with the team to define the direction to be taken. Then, the leader clarifies the exact responsibilities of each team member. Once these "laying the groundwork" tasks have been completed, the team leader can switch to whatever management style seems most appropriate under the current circumstances.

Management Behavior

We have just pointed out that there is no single management style that works best in a team. However, there are a number of behaviors that can assist in settling down a turbulent team and coaxing it into the most productive mode. Consider the following behaviors:

- *Be calm.* A team environment can be fraught with tension, especially when there are “A” team high performers with large egos battling each other. The team leader should convey an air of calmness through this turbulence, which can go a long way toward settling the entire team.
- *Listen.* There may be several dozen issues within a team that could potentially crater its performance. The only way for the team leader to understand all of these potential problems is to listen to what team members say, and watch them for changes in body language. The discerning manager can then arrive at conclusions regarding the true state of affairs. Thus, the team environment is a particularly fruitful place in which to practice observation skills. In order to observe, this also means that the main form of communication for the manager is face-to-face, not e-mail. See the following Listening Skills section for more information.
- *Push out information.* The team leader should be a distributor of information. Most information reporting systems are geared to accumulate information for the sole use of management, and this information will likely end up on the desk of the team leader. An excellent management behavior is to actively put this information into the hands of those people who need it the most, which are the team members. This information should literally include *everything* – the costs incurred to date, performance measurements, key metrics in the industry that can impact the project, and so forth. The best management behavior of all is to find out what other information the team needs, and then obtain it.
- *Push down planning.* The team leader does not do the planning for the team – the team does it. The team will not buy into a project unless they have thrashed out amongst themselves what the goal will be, the roles of each person on the team, and who is responsible for what. Also, requiring a team to plan eliminates one of the reasons that naysayers could otherwise use to backstab the team, which is that “we were not consulted.”
- *Push up at management.* If the team has a problem, the team leader should take on the burden of forcing the management group to resolve the issue. Problem resolution might require obtaining additional funding, materials, or personnel, or perhaps changing policies and procedures that are getting in the way. The team leader is the only person on the team who is empowered to do this.
- *Push back at performance issues.* When someone on the team is performing below expectations, push back at them at once. These issues may sometimes be dealt with by others in the team, but the team leader has the extra authority to give additional emphasis to the message. Pushing back cannot wait – teams may have such short-term performance targets that performance issues must be handled at once, before they fester.
- *Follow through.* When the team leader commits to take action on any issue, she must *always* follow through on this commitment. This means writing down the issue so that it is not forgotten and taking action promptly. By doing so repeatedly, the team will realize that she is completely reliable, and so will trust her in their other interactions with her.

Another management behavior only applies to situations in which a team member is on loan from another part of the company. In this case, loaned employees are essentially on leave, and so will not be involved in the usual departmental tasks that would normally allow them to earn promotions and pay raises. To ensure that they are not forgotten, an excellent management behavior is for the team leader to regularly update the actual managers of team members regarding what their loaned employees are doing. This can include recognition of good performance, as well as descriptions of new skills learned and tasks completed. This approach supports team members in their regular jobs. If this practice is wide-spread among team leaders, then employees throughout a business will be more likely to volunteer for work on teams.

Once a manager consistently exhibits the preceding behaviors, the team will realize that her core values are deeply aligned with them, and so will trust her more as their team leader.

Listening Skills

The team environment is an excellent place to learn listening skills, since there is so much interaction among the team members to understand. The best listeners are able to not only understand the words being spoken by someone, but also their tone of voice and the body language they use while delivering it. This means that the full attention of a person must be directed at someone in order to receive the full message being conveyed.

The first step in achieving proper listening skills is to encourage the other person to communicate. This means stopping whatever else the listener is doing, facing the speaker, and maintaining a consistent level of eye contact. In addition, maintain an expression of wanting to hear what the person has to say. This means not fidgeting, checking voice mail, texting, frowning, and so forth.

The second step in listening properly is to strive for the most active possible listening mode. The following are a number of levels of listening skills, starting with the best (active listening) and declining to the worst (passive listening).

1. *Active listening.* The listener pays complete attention to every communication channel being used – words, tone, and body language. The listener understands every aspect of the message being conveyed, and responds with cogent questions that focus on the key issues. When a speaker encounters an active listener, there is a high probability that the speaker will take the extra time to flesh out all aspects of the message.
2. *Attentive listening.* The listener pays close attention to the words being spoken, and is likely to have excellent retention of the words conveyed. He may also ask questions to clarify points being made, and comment on certain issues. However, he does not expand his perceptions to include the tone and body language of the speaker, and so may not understand the entire message being conveyed.
3. *Selective listening.* The listener only retains what he wants to hear, and ignores the remainder of the message. This approach can trigger substantial misunderstandings and conflict, since only part of the message is being conveyed.
4. *Passive listening.* The listener sits quietly, making no indication that a message was received, and not making any positive or negative gestures. When passive listening is used, the speaker receives no feedback at all, and so gradually “runs out of steam” and stops speaking.

There is an enormous difference between the volume and quality of information transferring to an active listener and a passive listener. When a team leader is an active listener, there are far fewer misunderstandings among the team members.

Coaching Skills

The leader of a team must engage in a considerable amount of coaching in order to squeeze the maximum amount of performance out of a team. In order to engage properly as a coach, the leader must first understand that this new role is not the classic manager role to which she may be accustomed. Being a coach does not mean being a firefighter, jumping in to resolve every crisis. Instead, a coach realizes that the real value generated by the position is to enhance the effectiveness of the entire team on an ongoing basis, so that there are fewer fires to fight. This can be accomplished by engaging in the following activities:

- *Meet with the team.* An accomplished coach circulates through the team, spending a lot of time engaging with each person. By doing so, one can determine whether anyone is beginning to diverge away from the team’s work plan, and implement a minor correction to bring them back on track. These meetings also allow the leader to spot instances in which additional resources are needed, and then take action to obtain them.

Team Management

- *Conduct meetings.* The leader routinely brings the team together to discuss progress, issues found, and any new information obtained. These meetings keep the group aligned, and can also bring the thinking of the entire group to bear on a particular problem.
- *Link people to plans.* The leader must always be aware of every aspect of the team's action plan, and refers to it whenever meeting with team members. Doing so reminds everyone of what they are supposed to be doing, and the deadline for the current work activity. This constant level of attention to the plan also allows the leader to make micro-adjustments to the plan on a continual basis.
- *Assign responsibility.* One of the main differences between a classic manager and a coach is that a coach pushes responsibility down into the team, rather than retaining it. This means that each team member is made well aware of what is expected of them, and how they are performing against that standard.
- *Give feedback.* When meeting with team members, the leader routinely gives feedback regarding how people are doing in comparison to expectations. This feedback is highly focused, noting exactly which performance or behavior was lacking, and what is expected. By giving feedback constantly, team members know exactly how they are doing at all times.
- *Recognize success.* Teams are designed to have concrete goals, so celebrate them when they are achieved – along with all of the sub-goals and individual accomplishments that occurred along the way. Doing so gives positive feedback to the entire team.
- *Mentor the team.* A coach that has a long-term view of the success of team members will mentor them. This means discussing with them their strengths and weaknesses, career plans, training needs, and so forth.

When engaged in coaching activities, keep in mind that the goal is not to make the team a fun group to work with. The goal is to achieve the target set for the team, which may require pushing team members harder than they would like. The outcome may be a situation in which the team views the coach as a hard taskmaster, but also as one who inspired them to achieve a major accomplishment.

Leadership Sharing

In the most effective teams, leadership moves among the team members. This is because the formal team leader recognizes that he or she is not always the most effective leader, depending on the circumstances. Instead, someone else may be an expert, and so is the best qualified to lead a discussion and make a decision. For example, if a person is a nationally-recognized expert on tire safety, the decision system for a group might be to designate this person as the one who will make a decision regarding the materials to be used in a new tire design, with input from the other team members. Once this decision has been made, the formal team leader steps back into his role.

As another example, a common team leader role is to negotiate a budget for the team. If someone else on the team is a better negotiator, this person can take over the negotiation role on behalf of the team – irrespective of what her regular job within the team may be.

When the leadership role is shared across the team this also builds more buy-in to the team's goals, since more members are involved in how decisions were reached.

The Management Group – Team Interface

Teams may work outside of the normal support structure of an organization, where they are dependent on a special allocation of funds, staffing, and other resources from the management group. Since these resources could be pulled back at any time, it is essential that a team keep management properly informed of its progress. This is especially important when a team is expected to be in existence for a fairly long period of time, since it may require funding authorization renewals at regular intervals.

Team Management

Since the interface between a team and management is so important, it should be formalized. This means that the team leader is specifically tasked with providing regular updates. Without a formal interface, a team might simply forget to contact sponsoring managers to let them know about goals attained or changes of direction, which could lead to managers becoming frustrated with a perceived lack of progress.

In a formalized interface arrangement, the team leader should use a standardized report template, so that the same information structure is presented each time. This may include such information as:

- Progress to date on each major deliverable
- Tasks behind schedule and estimated completion time
- Next tasks to be addressed
- Any changes to the team goal or the expected completion date
- Funding used to date and any variances from the budget
- Authorized funding remaining and expected changes in the amount needed

Reports should be issued on a specific timeline, such as once a week for shorter-term projects, or on a monthly basis for longer ones. Also, if there is a major change from expectations, inform management immediately, rather than waiting until the next scheduled report. This is especially important if the change will require the authorization of more resources by management.

Management's Treatment of Teams

A management group that is accustomed to the rigid hierarchical structure of a traditional corporation may have difficulty formulating the most effective way to deal with teams. Since teams operate outside of the normal management reporting structure, managers can have a tendency to retain an excessive level of control. For example, they could:

- Require extremely frequent reporting back to management
- Require that a representative be attached to each team as an observer
- Require constant incremental funding

In addition, managers may not know how to deal with people who have been transferred into a team. For example, team members might find that their original jobs were permanently filled once they left, or that there is no provision for updating their compensation while they are away on a team assignment.

All of these factors can make it difficult to staff a team, and to keep it productive once it has been formed. To counteract these issues, consider hiring a third party facilitator to work with the management group when teams are first formed. The discussion should include all of the points just noted – levels of reporting and funding, how to treat people assigned to teams, and how to determine compensation changes. The discussion could continue beyond the basics, to also address how the corporate culture could be changed so that team members are valued and rewarded, so that more people will be interested in serving on teams.

The management group can take steps to not only tolerate teams, but to create a corporate culture in which membership on a team is highly valued. Here are several possibilities for such an environment:

- Give preferred consideration to those who have served on teams for advancement to more senior positions.
- Make team experience a requirement for advancement into management.
- Include in the performance appraisal system a scoring category for the team experience of an employee.
- Award additional compensation increases to the most highly-rated team members.
- Budget generously for the resources needed by teams.
- Have the recruiting staff look for team player characteristics in new recruits.

Periodic Status Meetings

As noted earlier, the team leader should regularly schedule meetings for the team to discuss a variety of issues. Doing so forces the team together, while also allowing for more interaction between team members and a certain amount of joint decision making. The following activities can be included in a periodic team status meeting:

- *Status updates.* Each team member briefly summarizes their status, noting which items are completed, which are in process, and the approximate amount of work remaining on those in-process items.
- *Issues.* If someone has encountered an obstacle, they make note of what it is, what they plan to do to circumvent it, and any help they need from others to assist in the endeavor.
- *Future tasks.* Each person states what they plan to do before the next status meeting.
- *Feedback.* Ask the team how the meeting went, and solicit suggestions for how to improve it.

The topics discussed are documented by a team scribe (not the team leader, who is busy monitoring the discussion). The minutes from the meeting are completed immediately after the meeting, and distributed to all attendees (and possibly others who wish to be kept informed about team progress). When team members receive the minutes, they know that all other recipients are aware of the tasks to which they have committed themselves, which builds pressure to complete their work assignments on time.

A status meeting does not just inform people of the status of a project. It also requires team members to report their status in front of everyone else, so there is no way to hide any lack of progress. Further, it enforces planning discipline, since any future tasks to which someone commits will be brought up again at the next status meeting. Finally, it highlights issues that need to be addressed in the near future; this is especially useful, since team members might have been trying to address these issues on their own, and can now call upon the entire group for assistance.

Milestone Analyses

A team needs to stop periodically and take stock of its accomplishments and failures to date. By doing so, the group can address the issues that are making it function well (or the reverse), and make adjustments. Milestones are commonly used to set the date for a “take stock” meeting. A milestone can be the accomplishment of a goal, or could simply be a scheduled date – such as once a month. This review should involve the entire team, and can be a broad-ranging discussion of many topics, such as:

- Whether the stated direction of the team is correct
- Activities followed that turned out to be dead ends
- The appropriateness of expenditures
- Whether staffing levels are adequate

An additional analysis that can be of use is to examine the outcome of a team’s project once it has been completed. At this time, compare the actual monetary and time investment in the team, compared to the expected investment. Also examine the quality and effectiveness of the team’s deliverables as compared to expectations. Further, make note of the performance of each person assigned to the team. Then formulate a summary of the team, noting what changes could be made in the future for other teams.

Team Measurements

Every team should be given some kind of performance measurement. By doing so, it gives the team a common motivating challenge that they must meet as a group. For example, a product design team might be given a performance measurement of reducing the cost of a new product design by 25% from the cost of the previous model, or bringing a product to market in half the usual time.

Team Management

When deriving the proper type of measurement for a team, the main consideration is that it must call for the efforts of the *entire* group, not just one or two individuals within the group. If a measurement could only be impacted by one person, only that individual would have an incentive to improve the measurement.

If there is no measurement at all, then the team will lack a sense of urgency (see the next topic), and so is inclined to not put forth its best efforts.

Team Urgency

A team is much more likely to produce excellent results if it is made clear that the expected product of its efforts is of critical importance to the business, and that results are needed on an expedited basis. In this higher-pressure environment where the group has a meaningful target, people are more likely to put forth their best efforts. For example, when a business is losing all of its profits to product returns that are caused by low quality, a team assigned to eliminating product errors will realize that its efforts can save the business. This is clearly a worthwhile objective, so participants will fully commit to the project.

Team Budgeting

A team *must* be given its own budget, and the allocated funds should be committed before the team begins its work. By doing so, there is no problem with continually having to beg the supporting departments for funding issuances. This also keeps teams from being abruptly terminated. The funding for a team should be laid out in enough detail to encompass every type of expense that might reasonably be encountered, such as:

- Salaries and wages
- Payroll taxes
- Consulting fees
- Office supplies
- Office rent
- Travel and entertainment
- Training
- Utilities

Of the preceding expenses, the one that tends to be budgeted too low is the training expense. The members of a team may require a series of training classes to qualify them to handle some of the issues that may arise during their tour of duty with the team. The associated cost per team member may be several times higher than a department might normally experience.

If team costs are buried within the budget of the sponsoring department, it is next to impossible to determine how much money is being spent on a team.

Tip: A remarkable amount of time is required to coordinate the activities of a team, and to ensure that everyone is fully capable of performing their jobs. Consequently, budget at least 20% of the team's time for training and meetings.

If a team has a significant number of members and it is expected to continue with no end date in sight, it can make sense to set up the team in the accounting system as a separate department. This makes it easier to code transactions to the team's account, and to generate budget versus actual reports at the end of each reporting period.

External Reports

The team leader should periodically issue a report that summarizes the progress of the team to date, perhaps on a monthly basis. The intent is to keep interested parties informed about progress against key milestones, planned activities to occur within the next reporting period, significant results, and any issues encountered that may impede the progress of the team. This information should be provided in the minimum amount of space, since busy managers do not have time to wade through a detailed report to locate the few key nuggets of information.

External reports are especially necessary when a team is supported by a sponsor, which is usually someone in senior management who is providing funding and other resources to the team, as well as supporting its activities. This person must be made aware of all team issues and updates on a regular basis, or else support could be withdrawn.

Self-Directed Teams

A self-directed team has no managing team leader. Instead, the team manages itself. Thus, team members are responsible for jointly setting goals, timelines, and work allocations. This type of team still reports to a manager, but that manager is located outside of the team. For example, a self-directed product design team might report to the vice president of engineering.

There are several reasons for promoting the use of self-directed teams. First, there may not be a sufficient number of qualified managers to handle a large number of teams. Or, the members of some teams are so experienced that they clearly have little need for supervision. Or perhaps senior management is promoting a flat organizational structure and sees an opportunity to eliminate another layer by removing managers from teams. Another possibility is the expectation that a self-directed team will not be held back by any restrictions that may be imposed by a manager, and so can generate more creative results.

A self-directed team is more likely to have no termination date. Instead, it has an ongoing mission that may never end. Conversely, few self-directed teams have tight deadlines, since a tight deadline usually calls for the services of an experienced leader who can cajole the team into attaining maximum performance.

For a self-directed team to produce good results, it must have several characteristics that allow it to operate properly. These characteristics are:

- *Involvement.* Team members must be able to participate in the planning process, which means setting their own deadlines and work schedules.
- *Empowerment.* Team members are given a mission and then allowed to fulfill it in any manner they choose. True empowerment only comes with a sufficient amount of resources (in terms of funding, staff, facilities, equipment, and so forth) to do the job properly.

It can be difficult for managers to authorize the use of self-directed teams, since it introduces the nagging suspicion that a team will be unable to manage itself, and so will generate results well short of expectations. Management can overcome this hurdle by giving team members extensive training and advisory support in managing themselves. Also, the concept can be rolled out gradually, so that a team takes on more management tasks over time as it becomes more comfortable with the idea. Here are several ways to gradually assign more management responsibilities to team members:

1. Transfer over those tasks that are already going well. Employees can watch how these tasks are performed, and then mimic the process until they can duplicate the tasks flawlessly. These processes are already fully documented. This approach gives them experience right away with a successful process. Better yet, initially focus on those tasks that will not spark conflicts with others, so that trainees can focus on processes, rather than people.
2. Transfer over those tasks that require some improvement. At this stage, team members are comfortable with the process of taking on new skills, but need to learn about how to improve them, and to document how the altered systems function.

Team Management

Also, management could limit the concept to its most experienced and mature teams that are most comfortable working with each other. For example, self-direction might only be allowed after a team has worked together for at least a year.

Eliminating a manager does not mean that a business will necessarily save the cost of that manager. Instead, a likely outcome is that the work previously performed by the manager is now spread among the entire team, which reduces the amount of time that they can spend on their assigned tasks. The outcome may be a decline in output or a request to add another staff person to the team in order to make up for the time lost to management responsibilities. The management tasks that a self-directed team must take on include the following:

Approving timesheets	Issuing reports
Budgeting	Purchasing services and materials
Developing procedures	Representing the team with outsiders
Disciplining team members	Scheduling work
Hiring new team members	Training team members

In this environment, there is still a need for someone with a team leader title. However, the content of the job has now changed. Instead of having supervisory authority, the team leader is limited to reporting to management, taking instruction from management, and facilitating the implementation of those instructions. Those team leaders who previously acted as managers can have a hard time moving into this more limited role, since they have no real authority within a team and have no experience with this new type of role.

The team leader does not have to be the most senior or the most experienced person on a team. The most important requirement for the job is to have the respect of the team, so they will be more likely to work with the team leader as he or she engages in facilitation activities.

In addition to facilitation work, the team leader in a self-directed team is in charge of managing the boundaries of the team. This can involve dealing with customer issues, problems with suppliers, interfacing with the organization's attorneys over legal issues, meeting with other groups, bringing in technical training, and so forth.

A self-directed team has the following characteristics:

- *Collective management.* The group shares responsibility for management tasks. Thus, budgeting might be assigned to one person, or it could be shared among several people, while procedure development could be taken on by a different person. If the team is not familiar with management activities, this can require the selective use of additional team training.
- *Flat hierarchy.* There is essentially no reporting structure within a self-directed team. Even the team leader is essentially a "first among equals," with no special authority or privileges.
- *Few job descriptions.* The team members have few or no job descriptions, since each person is expected to take on one or more management activities in addition to his or her regular work. In addition, team members are more likely to take on different tasks within this type of team.
- *Broad information sharing.* Since everyone on the team will be involved in its regulation, everyone needs access to the information that would normally only be directed toward a manager. In addition, the entire team must have access to *any* information that can assist them in their task. For example, a product development team might need a comprehensive suite of information about the specifications of competing products, the costs of component parts, and the financial results for the product that is being replaced.
- *Numerous meetings.* A self-directed team needs to co-ordinate its activities frequently, to ensure that the group is progressing together in the same direction. This may require daily meetings. Given

Team Management

the frequency, it is usually not necessary to have overly long meetings – perhaps only enough time to clear up a few issues each day.

- *Self-directed.* As the team name implies, each member of a self-directed team manages his or her own activities, deciding which tasks need to be addressed first, and which can be delayed.

The traditional corporate structure contains silos, where each functional part of a business has authority over certain things. For example, the accounting department imposes financial controls on the business, such as requiring supervisory signoff on all employee timesheets and expense reports. Or, all product design suggestions must be approved by the vice president of engineering. Another issue is that the human resources department requires employees to use their vacation time by year-end, or lose it. The restrictions imposed by these silos can negatively impact a team, especially since teams are frequently designed to operate outside of the traditional corporate structure. If so, a self-directed team can appeal to the outside manager to whom it reports. A team cannot be expected to convince the manager of a silo to make a change, but the manager to which a team reports might wield a sufficient amount of organizational clout to ease matters for the team.

When there are multiple self-directed teams, it is quite possible that each of the teams will experience the same issues. If so, it can make sense to form a committee that is comprised of representatives from the teams. This committee is used to air issues being encountered, and to ask for advice from the other teams. If there are no issues, then the committee does not meet. The only purpose of the committee, then, is to share information across the groups.

If multiple teams are working in the same area, then the purpose of the committee can be broadened to include notifications of work being done. If a change being instituted by one team will impact another team, then the two teams can consult with each other to determine the best way to proceed. This added role gives the committee the task of being a *distributor* of information.

Summary

The management of a team requires an enhanced set of skills. Someone acting as a team leader must be an exceptional listener, and be comfortable with cajoling team members, providing constant feedback, and generally accelerating the flow of information throughout a team. These skills should be accompanied by a minimal amount of ego – the team leader must realize that attaining a goal is a team accomplishment, not something for which the leader can take full credit. This state of affairs is quite different from the traditional manager role.

Review Questions

1. The following behaviors are useful for a team leader, except for:
 - a. Distribute information
 - b. Own the planning process
 - c. Be calm
 - d. Follow through

2. The following is a valid coaching skill that a team leader can employ:
 - a. Share in the work
 - b. Give feedback
 - c. Send out members for mentoring
 - d. Make the team a fun place to work

3. A self-directed team has the following characteristic:
 - a. Information is directed at only those members who need it
 - b. A series of regimented meetings
 - c. A small number of job descriptions
 - d. A hierarchical management structure

Chapter 4

Team Decision Making

Learning Objectives

- Specify the types of decision-making systems that a team can use, when they work best, and when they can go wrong.
- Identify the approaches that can be used to improve the quality of team decisions.

Introduction

When a team contains a number of people with different types of experience and training, it should theoretically result in a more comprehensive examination of each decision to be made, which should yield better outcomes. Instead, teams are famous for making *incorrect* decisions. For example, there is a tendency for teams to allow their desire for group harmony to overshadow the need for a critical evaluation of alternative options that might yield better outcomes. In this chapter, we describe the different types of decision making processes, how consensus is reached, the causes of faulty decisions, and several related topics.

The Decision Making Process

There are a number of ways in which decisions can be made within a group. No single approach will always work under all circumstances. Instead, it may be necessary to adopt a mix of methods, depending on the circumstances. The methods used to make decisions are:

- *By the team leader.* Historically the most common approach, unilateral decision making results in fast decisions, which is ideal when there is an emergency or an issue is considered too minor to be worthy of the attention of the full team. However, a large number of team members may disagree with the decision, and will not be supportive. Also, if they do not understand the reasoning behind a decision, they may develop the firm conviction that the team leader is an idiot.
- *By the team leader, but with input.* This approach is generally better than a simple unilateral decision, since the team leader can spend some time collecting opinions from those with the most relevant knowledge. However, this is still an abbreviated discussion, so those left out of the process may not support the outcome.
- *By majority vote.* This approach requires a discussion by the team, so there is better buy-in to the outcome. It can work well when team sizes are quite large, since a more detailed discussion of many alternatives would be too time consuming. However, since there may still be a large minority that does not support the decision, there may be a significant lack of support. Also, the voting process tends to allow for only a few choices from which to pick.
- *By consensus.* The group as a whole agrees to support a decision. This approach generates the highest level of support, but it requires a long time to grind through the variations on each possible option, as well as the related pros and cons. The consensus approach only works when the team has excellent communication skills, and the number of participants is relatively low. If consensus building were used in a large group, it would take an inordinate amount of time to reach a general agreement.
- *By primary decider, but with input.* Someone who is considered to have the most applicable knowledge and experience makes the decision, with input from the entire team. This approach is a cross between decision making by the team leader (unilateral decision making) and the consensus

Team Decision Making

model. It allows for the discussion of all points of view, so it tends to generate more support. However, it can take time to complete, and will only work if the primary decider is actually able to listen to and assimilate all of the team's decisions.

The more important decisions that require the most team support should be arrived at through one of the more all-encompassing methods, preferably one of the last two methods stated in the preceding list.

Consensus Building

In the preceding discussion of the decision making process, we noted that one of the options was to arrive at a consensus, which is general agreement to support a decision. The process required to reach a consensus can be long, since there are several steps that the group must first complete. They are:

1. *Address all options.* The group needs to see every possible alternative for a decision. By engaging in a thorough discussion of each one, team members will have a better sense that they have arrived at the best possible decision.
2. *Look for commonalities.* Review the list of alternatives and see which elements of each option are the same across multiple options. By focusing on these items, people supporting different options can see which elements of their favorite choices are actually present in other alternatives.
3. *Explain each option.* The preceding step may have encouraged team members to be more open about supporting alternative solutions, so this is a good time to have the prime supporter of each option explain the points in favor of using it, as well as possible disadvantages.
4. *Settle differences.* Now that it is fully informed, the group ruminates over the choices, discussing how to resolve the differences between the various choices. Once it appears that a consensus has been reached, poll the participants to verify that this is the case. If not, consider the remaining objections, which may result in a modified final outcome.

A team could theoretically reach a consensus by trading favors with some dissenting team members to support their favorite projects at a later date. Or, they might become impatient with the consensus building process and switch over to a majority vote. Either method of shortcutting the process does not help, because both result in minorities still opposing whatever the decision may be. Instead, take the extra time and work all the way through the consensus building process.

The outcome of consensus building is not to convince everyone that they are in favor of a decision, but rather that they will support it. Being willing to support a decision means that a person may not agree with a decision, but the outcome is reasonable enough that the person will not oppose it, and hopefully will be proactive in ensuring that the decision results in a successful outcome.

The number of activities involved in consensus building should make it clear that this approach is to be used only for major decisions. If it were to be rolled out for every minor decision, no work would ever be done, since the group would be continually tied up in meetings. Consequently, the team leader needs to isolate only a small number of decisions for consensus building, which are those impacting a large part of the team.

One area in which consensus building can work quite well is in the development of a work plan. Team members are in the best position to know their skills and capabilities, so the group can mutually figure out who will be given which tasks. This can certainly include the mutual determination of due dates for the various work products.

Incorrect Consensus Outcomes

A team could appear to be following the standard approach for reaching a consensus, and yet the outcome is less than optimal because there was not actual agreement among the team members to support a decision.

Team Decision Making

This situation arises when there are problems with how the consensus building process was followed. Here are several examples:

- A team is under a massive amount of pressure from senior management to fix a problem related to the catastrophic failure of car tires. Team members do not pursue alternative courses of action, since doing so would make it impossible to meet the deadline.
- A team is working on energy reductions in a company's heating, ventilation, and air conditioning systems. A subject matter expert on air conditioning equipment does not feel that he has the expertise to comment on a decision regarding the company's heating systems, and so elects not to say anything.
- In a multicultural team, one person comes from a country in which open discussions are discouraged, because no one wants to lose face. Rather than raising concerns about a certain course of action, which she perceives as questioning the judgment of the team leader, she instead indicates that she will support the decision.
- The team leader is going through the motions of building a consensus, but is not attempting to read the body language and other signals being sent by team members, and so declares that a consensus has been reached even though several members are unhappy.

There is no one regimented way to resolve the problems indicated in the preceding examples. The occasional use of a third party facilitator can be helpful for noting instances in which a consensus is of lower quality, but in most cases team members must be able to recognize when the consensus process is flawed, and interject themselves into the process to ensure that a higher-quality outcome is attained.

Causes of Faulty Decisions

There are a number of reasons why a team may reach decisions that are eventually proven to be incorrect. In the following sub-sections, we explore the reasons why faulty decision making occurs.

Group Pressure

One of the main causes of decision making problems within a team is group pressure. In essence, one or more members of a group exert undue influence on other team members in order to gain approval of their viewpoints. Here are several examples:

- *Powerful leader.* The team leader has more experience or knowledge than anyone else on the team, or has a senior position within the organization. Other participants may be overawed by the level of power exhibited by the leader, and so never put forward their own opinions.
- *Late entrant.* Someone is added to a team after the team has been in existence for some time. This person has not had an opportunity to mesh with the rest of the team, and so is less likely to put forth her opinions regarding decisions being made.
- *Junior staff.* Any junior staff person is likely to perceive himself as having little power within a team, and so is more likely to keep quiet when decisions are being debated.

The effects of group pressure are pernicious. A possible outcome is that project cost and time-to-completion estimates are not thoroughly examined, resulting in excessively optimistic projections. In addition, if the core elements of a team want to continue funding a project, despite clear cost overruns, they can exert enough pressure on the rest of the group to go along with continued funding.

Conformity

The weaker members of a team are less likely to point out errors being made by the rest of the group, in order to avoid giving the appearance of being difficult or lacking in knowledge. Instead, they go along with the views of the majority.

Decision Cascades

When a group is making a decision, there is a strong tendency for the first few people polled to have an outsized impact on the remaining people of the group who have not yet made their opinions known. For example, if the first few people polled all state the same viewpoint, the next person polled will be less likely to state a diverging viewpoint, which creates yet another vote in favor of the existing group. As this core voting group expands in size, the remaining people not having voted are even less likely to dissent.

Polarization

When the members of a group already have a predisposition in favor of a certain decision, further discussion within the group is likely to shift the group's decision even further in the direction of the initial predisposition. For example, if a group was initially in favor of an aggressive move into a new market, further discussion amongst themselves will probably result in a decision to invest even more heavily in that market. Conversely, if the predisposition was slightly in favor of not investing in a new market, the group's ultimate decision will probably be to avoid the market for an even longer period of time than was first contemplated.

Confidence

When a person is highly confident of an outcome, he or she is more likely to adopt a more extreme position. Conversely, if a person is not confident of an outcome, then the outcome supported is more likely to reside at a mid-way point between the most extreme possible outcomes. When a team allows for the voicing of multiple viewpoints, this presents more possible outcomes, which reduces confidence in any single outcome, and so tends to drive the group toward a more moderate decision. In the absence of multiple viewpoints, confidence in a particular outcome is higher, which therefore leads to more extreme decisions.

Improvements to the Decision Making Process

There are a number of ways to improve the quality of the decisions made by a team. They are as follows:

- *Assign roles.* Formally assign a role to each person on the team, which essentially makes each person the local expert on the assigned topic. This means that each person is *expected* to provide a critical analysis of the topics in his or her assigned areas. An interesting variation on this concept is to specifically assign a sub-group within the team the role of picking holes in the arguments that form the basis for the decisions being reached. In essence, this group is ordered to take a contrarian view (see the next section).
- *Authorities go last.* When a powerful person in a team refuses to voice an opinion, this allows others on the team to present additional information that they might otherwise not mention if this individual had made his views known from the outset.
- *Encourage critical analysis.* If all team members are actively encouraged to analyze decisions in detail, they are more likely to provide their findings to the group.

Deviant Thinking

A team that communicates intensively might be considered the perfect operating unit, since it will likely function in a highly effective manner. However, this highly effective behavior may be directed at the wrong goal. Groups can become too fully invested in the current direction, and do not stop to consider whether there are any flaws in the strategy.

A person who exhibits deviant thinking can be highly useful in this environment. A deviant is willing to publicly point out flaws in the current strategy, along with possible repercussions. By doing so, the deviant forces the other members of a team to defend the current direction, and possibly to explore alternative paths.

Team Decision Making

Someone willing to act as the team deviant is difficult to find, since the required behavior goes against the close-knit nature of an effective group. Also, there may be peer pressure to keep quiet, especially if a re-evaluation of the team's direction could slow down completion of the expected deliverable or impose additional costs. Consequently, the team leader needs to be quite supportive of this person's activities, particularly in regard to shielding him from the negative comments of the rest of the team.

Summary

It will be necessary to use several alternative approaches to decision making. Most smaller or "maintenance" decisions can be made by the team leader, and will have little impact on the ultimate success of a team. Of more importance is identifying which decisions are critical to the team's goal, and deciding how these decisions are to be reached. Some amount of consensus building will likely be needed, though the team must watch for a number of issues that can result in incorrect consensus outcomes.

Review Questions

1. The following are steps in the consensus building process, except for:
 - a. Look for commonalities
 - b. Settle differences
 - c. Address all options
 - d. Choose sides

Chapter 5

Dispersed Teams

Learning Objectives

- Recognize situations in which a team may be dispersed.
- Specify how to create an emotional connection between the members of a dispersed team.

Introduction

Many organizations are finding that the talent they need is located across broad geographic regions, and cannot be persuaded to move to a single location. Instead, these individuals are collected into teams that work together from their home locations. This is a trend that has accelerated as businesses expand geographically and telecommuting becomes a common work alternative. In this chapter, we explore the management and other issues associated with dispersed teams.

Managing the Dispersed Team

How to manage a dispersed team is a major issue, since talented employees may be located far away from company facilities. As examples, the following situations may arise:

- A product design team needs deep local knowledge of what customers want in specific markets. This expertise is only available from people based in those regions.
- A software development team needs the expertise of a developer whose skills at working in a specific software language are excellent; the demand for his work is so high that he can work from a log cabin in the mountains, irrespective of where his customers may be.
- A particular type of consumer product requires extensive testing to ensure that it will comply with all government safety standards. An expert in these standards has agreed to work with a product development team on an occasional basis, to provide advice on which features may run into regulatory land mines. Since he is only needed at longer intervals, he will only consult via e-mail and video chats.

In these and other situations, the team manager will find that more problems than usual will arise. Communications will be an issue, since there is no way to have in-person meetings to clarify differences of opinion. Also, if people are spread across multiple time zones, it is more difficult to schedule meetings and hand off projects. The result can be an increasing level of mistrust between the team members, or at least a high level of inefficiency as a team uncovers problems and needs to backtrack to earlier project stages to find alternative solutions. Customers may find that deliverables are completed late, and that the results achieved do not meet their expectations.

In the following sub-sections, we note several issues that can cause problems for a dispersed workforce, and how to resolve them.

Emotional Connection

Teams tend to work together best when there is a strong emotional connection between team members. This connection is highest when members can directly interact to discuss projects, align their needs, and build trust. A dispersed workforce can have quite a difficult time developing a strong emotional connection, since it is hard to foster the necessary social connections. Here are several specific conditions related to the emotional connection problem, and how to resolve them:

Dispersed Teams

- *Disparity in team sizes.* There may be one location where most of the team members are located, with the remaining members scattered among several other locations. In this situation, there is a tendency for the largest group to ignore the input of the few outside members. The team leader can reduce the issue by soliciting and recognizing the contributions of the outside groups, emphasizing the common purpose of the entire group, and spending extra time communicating with the outlier personnel.
- *Large teams.* Some dispersed teams have dozens of members. Given the difficulty of overseeing people who may be based all over the globe, this makes it difficult to make every member clearly responsible for each deliverable. Instead, some employees will have an opportunity to loaf on the job without being detected. In addition, it is more difficult to keep all members of a large team current on the latest information. These problems can be corrected by keeping dispersed teams smaller than the normal team size. The maximum team size should certainly not exceed 10, and many teams function best with half that number of participants.
- *Lack of empathy.* In a properly-functioning team, members regularly have opportunities to engage in informal discussions, perhaps over lunch or in the break room, which allows them to build a sufficiently high level of empathy to allow for productive interactions regarding team-related tasks. Since this “face time” is not readily available to the members of a dispersed team, alternative approaches must be found to build empathy. Possible options are to schedule periodic “in person” meetings with extra time available for social interactions, favoring videoconferencing and phone calls over e-mail (which allows for less interaction), and blocking out time during conference calls for informal “chat” time. “In person” meetings are especially valuable at the start of a project, since team members can use this time to become more comfortable with each other before the daily distraction of project demands get in the way. In addition, consider quarterly group meetings, perhaps at an off-site location, where everyone can discuss project status and socialize.
- *No prior history.* There may be cases in which every member of a dispersed team is new to every other member. If so, the preceding empathy problems will be exacerbated, since the team is “starting from scratch.” However, this may not really be the case. It is possible that some of the team members have interacted with each other during prior projects. If so, they may have already built working relationships that can be carried forward into the current project. If this is the case, the team leader should consider linking up the indicated individuals for some tasks, since they may be more effective when working together. At an expanded level, these pre-existing relationships could be used as the nucleus of a larger group, whose performance is thereby augmented.
- *Uncomfortable team members.* Some members of a dispersed team may be uncomfortable with working on their own, or at least away from the main group of team members. Evidence of this issue is not participating sufficiently in team discussions, requiring constant oversight, and meeting goals late. Though some of the other concepts noted in this section can improve the performance of these people, it is also possible that the only solution is to remove them from a dispersed team environment. In extreme cases, they should be kept in a more structured environment in the future, and not allowed to participate in a dispersed team. Yet another action to consider is to screen all prospective team members with a personality test or behavioral interview to see if they have those characteristics that have proven to work on these types of teams in the past.
- *Late entrants.* It is fairly common for additional team members to be added after a project has already started. If so, these late entrants are operating at a disadvantage, since they never met anyone at the initial kickoff meeting, and instead will probably just be given a brief introduction during the latest conference call or videoconference call. This parsimonious welcome may lead to less interaction with the group, and less weight in decision making. To mitigate this problem, consider flying late entrants to the various work locations to meet the other team members in person. This is especially important if a project is expected to continue for a long period of time.
- *Dispersed decisions.* When decisions are made, it is more difficult to enforce them across all members of a dispersed team, especially when people are located in such different time zones that they

Dispersed Teams

do not hear about changes in direction until hours later. This is a particular problem when a project environment calls for continual changes in direction. The manager should reinforce decisions with team members by issuing update memos that list all decisions reached. It is also useful to reinforce decisions by using mixed communication formats, such as initially issuing information by e-mail, and then following up with a phone call. A mix of formats tends to reinforce messages with recipients.

- *Language problems.* When team members use more than one language, there will usually be an agreement to communicate in just one language that is spoken by the largest number of people on the team. If so, this tends to exclude the contributions of those remaining team members whose grasp of the default language is poor. In this situation, encourage those team members using the default language to avoid speaking with slang phrases that are difficult to understand, and to speak at a slow pace. Both changes allow for better comprehension by all team members. In addition, discussions should be periodically paused to verify that all team members understand the flow of the conversation. Further, whoever is monitoring a discussion should call upon those team members not contributing to ensure that they understand the discussion. Finally, encourage all team members to interrupt and ask for clarification if they do not understand what has been said.
- *No physical connection.* Some team members may be located alone and in distant locations. It may not be cost-effective for these people to travel the distances required to regularly visit the home office. The result may be a feeling of isolation, with no real connection to the rest of the team. If so, it can make sense to require the person to initially work at the home office for several months. By doing so, the person gains a much stronger sense of identity with those members of the team who are situated in that location, and begins to understand the values of the team and how they interact. Once this initial period of familiarization is over, the person can shift back to his or her original location. If the term of a project is substantial, it can make sense for these people to occasionally make additional trips to reconnect with the team. If the project duration is shorter, just the single trip may be sufficient.

Forms of Communication

An extremely dispersed team may be located across many time zones, which makes it more difficult to engage in effective communications. The best and most immediate interaction can be achieved with videoconferencing, but this may not be a viable option when some members are working well outside of the normal work hours of the rest of the group. Conversely, e-mail messages may not be answered for hours, which can interfere with work products that are on a tight deadline. These issues can be mitigated by using different forms of communication, depending on the type of communications required. For example:

- *E-mail.* Useful for status updates and the sharing of information.
- *Videoconferencing.* Useful for the clarification and resolution of problems, as well as for presenting a position regarding a decision.

The team leader should reinforce his or her preferred form of communication by using it. Thus, if the decision is to increase the use of phone calls and downgrade the use of e-mail, the manager should reinforce the preference by doing just that.

Tip: When using videoconferencing, have employees give each other virtual tours of their workspaces. Just a simple panning of the camera around a room can alter the opinions of co-workers, once they realize that a person is burdened by working in an open-plan space, or near a busy corridor.

One form of communication that can present particular challenges is the conference call. When many people are listening in on a conference call, it is quite likely that only a few people will be actively involved,

Dispersed Teams

which means that everyone else could be engaged in more productive activities. Consequently, the participant list for conference calls should be as short as possible.

Tip: Use a conference calling service that does not require access codes for participants. This is useful when attendees are driving, and cannot stop to punch codes into their phones.

A problem with both videoconferencing and conference calls is that, with large numbers of people in attendance, there is a tendency for participants to go along with the consensus opinion, rather than speaking up to address key problems. To combat this issue, assign a senior person the role of probing for unspoken concerns and making sure that these items are discussed at a sufficient level of detail.

Tip: Some team members may prefer certain forms of communication. For example, one person's Internet connection may be poor, so videoconferencing does not work. If so, create a list of the preferred form of communication for each person, and ask everyone on the team to use this method when communicating with someone who has indicated a preference.

Team Size

We noted earlier under the Emotional Connection sub-section that a large team will have emotional connection issues, since there is an opportunity for some members to be "lost in the clutter" and underperform. Nonetheless, management may still decide for various reasons to have large teams. Their reasoning may be that additional people must be "kept in the loop" regarding team progress, especially if team activities could impact other departments. For example, if a team is developing a new software product, the team may include representatives of the sales, marketing, and legal departments, just so that the managers of these departments will be aware of team progress. Alternatively, a few specialists may be assigned to a team, but will only be involved for a short period of time. For example, a trademark attorney could be assigned to a product development team, and is only involved in the filing for a trademark on the product name.

In these situations, consider setting up tiers of team members. The core group that is deeply involved on a daily basis is included in all communications. Those people assigned to the team as liaisons are notified of key decisions made, and sent periodic status reports. Anyone who is only scheduled to be involved for brief periods of time is kept out of the communications loop until their scheduled participation dates are approaching. Once these individuals have completed their work, they are removed from all communications links. This tiered system allows a team to have a relatively large number of members, while still maintaining close daily communications only among a small number of people.

Rules

Each member of a dispersed team assumes that the rules of interaction for the team are those that he or she is accustomed to using. For example, one person might have a practice of only responding to e-mail once a day, in order to concentrate more fully on other tasks during the remainder of the day. Meanwhile, another person located elsewhere may be accustomed to receiving immediate responses to e-mails, in order to more quickly arrive at key decisions. These assumptions regarding rules of behavior should be settled when a dispersed team is first formed, so that everyone follows the same rules. Otherwise, it is entirely possible that frictions between the team members will arise that are caused by inaccurate perceptions of the work habits of other people.

Web Page

It can be useful to create a web page for the specific use of a team. This can be used to post any pictures that team members want to share, along with announcements by the team leader (or anyone else). The page could even include a team logo or slogan. A web page of this type can be useful for bringing a sense of identity to a dispersed team.

Summary

It is difficult to foster an emotional connection among the members of a dispersed team, simply because they cannot interact in person. There are many ways to combat this, including in-person kickoff meetings, the increased use of videoconferencing, smaller team sizes, and a great deal of facilitation work by the team leader.

The Team Leader

The team leader of a dispersed team is placed in the difficult position of being unable to work directly with team members, instead having to rely on long-distance forms of communication. This means that the leader will have a hard time perceiving any visual or auditory cues that may appear during a videoconference or phone call regarding how team members are feeling. One of the few ways to combat this problem is to appoint people to the team leader position who have an unusually acute ability to detect and correctly interpret these cues. This ability can be enhanced by giving team leaders additional training, but the best scenario is for the individual to already have an innate ability that can then be expanded.

The leader of a dispersed team must spend a large amount of time engaged in facilitation activities, in order to maximize the contributions of everyone on the team. This means that the leader should have extensive practice and training in the art of facilitation. The worst type of team leader for this situation is someone who is accustomed to the command-and-control style of management; this approach would mean that team members would be driven *away* from the team, rather than wanting to support it and contribute ideas to achieve its goal.

Multicultural Issues

When a team contains members from two or more different cultures, this can introduce a number of issues that can derail a project. The following issues could be of particular concern:

- *Indirect communication methods.* In some cultures, issues are raised indirectly, in order to prevent anyone from losing face with their colleagues. For example, there is quite clearly a security flaw in a software project, but the person bringing up the issue may need to point it out indirectly, such as by asking what would happen if a hacker were to access the system in a certain way. If someone with a more direct communications approach were to bring up issues with people accustomed to indirect communications, he or she might be deliberately excluded from future interactions with the rest of the team.
- *Language fluency.* When team members are using a common language to communicate but the levels of fluency in that language vary by person, there is a risk of exclusion. Those people with less fluency are more likely to be shunted aside or ignored, which also reduces their interest in participating in team discussions. It is quite possible that the contributions of the most intelligent and well-informed person on a team are not used or even heard.
- *Speed.* The cultural norm in some countries is to contemplate all aspects of a proposed decision for a period of time before making a commitment, while people in other countries are far more likely to cut off analysis after a short period of time and move directly to a decision. When people from the first group are working with people from the latter group, the decision process can be quite frustrating for both parties.
- *Treatment of authority.* In some cultures, there is a strict hierarchy in which junior employees always defer to more senior employees. This can cause problems in a team environment, where the reporting structure is flat. If a junior person from such a culture is included in a team, that person is more likely to defer to others, rather than stating his or her opinions in a forthright manner.

Dispersed Teams

- *Formal meeting rules.* People from some cultures prefer a relatively formal meeting environment, where they are specifically asked to make comments. If no request is made, then they do not participate. If this is the case, and especially when a conference call is being used in which the attending participants are “faceless,” the person managing the meeting should consult a list of team members to ensure that all people are asked to participate.
- *Humor.* When all members of a team come from the same cultural background, a good tool for making members comfortable with each other is to employ humor at various times. However, this concept can backfire badly in a dispersed team with members from several cultures. At best, some members simply will not understand a joke; at worst, they could be seriously offended. Consequently, the use of humor may have to be employed with great care.

There are several ways to deal with these concerns. One possibility is to have the team members identify these issues and work through them without any management intervention. Since the team has resolved the problem themselves, there is a high degree of buy-in. A possible outcome of this approach is that a mid-way point is found that is reasonably acceptable to all parties. Another option is to break the team into sub-groups, where the mix of personnel in each sub-group is designed to minimize multicultural issues. However, at some point the work products of these sub-groups must still be merged back into the primary team product, so some mediation will eventually be required. A third alternative is to rely on management intervention to settle differences. While this option can produce immediate results, it does not address the underlying multicultural issues, which may persist for a long period of time. Finally, if all other options do not work and the emotional conflicts within a team are high, it may be necessary to remove someone from a team. This approach works best when a team is expected to continue for a long period of time; conflicts that continue indefinitely would otherwise damage the ability of the team to function.

Time Zone Issues

A widely distributed team will span a large number of time zones, and may be scattered all over the planet. If there is a need for routine phone or videoconference meetings, this can present a major problem, since some team members may have to be on the call late at night, while others must get up early in the morning to participate. If there are a number of these meetings, those parties forced to participate could become quite annoyed by the situation, especially if it appears that certain locations are being favored with more normal working hours. To mitigate the level of friction that could arise, consider shifting the time of day for each successive meeting, so that the annoyance of attending at all hours is shared equally among the team.

Summary

The productivity of a dispersed team is likely to be lower than a regular team, given the inherent disadvantage of having team members located far apart. The situation can be overcome to some extent through the methods noted in this chapter. It is especially critical that an experienced team leader be put in charge, since the level of facilitation skill needed for this type of team is much higher than for any other type of team. Also, the probability of having problems occur in a dispersed team is high, given the number of areas in which issues can appear. Consequently, the team leader must constantly be on the lookout for the next issue that may impact team performance.

Review Questions

1. The ___ form of communication may not work well when work products are on a tight deadline.
 - a. Face-to-face
 - b. Videoconferencing
 - c. Conference call
 - d. E-mail

2. The following issues with a multicultural team can interfere with a project, except for:
 - a. Language fluency
 - b. The treatment of authority
 - c. A large travel budget
 - d. The use of humor

Answers to Course Questions

Chapter 1 – Introduction to Teams

Review Answers

1. The following is an example of a work group:
 - a. A customer account team
 - b. A group formed to make a recommendation
 - c. The accounting department
 - d. A product design group
 - a. Incorrect. A customer account team works together to provide support to a customer, and so qualifies as a team.
 - b. Incorrect. A recommendation team works together to make a determination regarding a course of action. Since there is a specific goal, this is a team, not a work group.
 - c. **Correct. The employees in an accounting department are not necessarily interdependent, so this is a work group, rather than a team.**
 - d. Incorrect. A product design group must interact intensively to create a design, usually within a compressed time schedule. Since the group is highly interdependent, this is a team, not a work group.

2. The following environments are not conducive to the formation of teams, except for:
 - a. There are a large number of functional silos
 - b. A business is not generating any profits
 - c. There are a large number of union work rules
 - d. Managers seek out the opinions of others
 - a. Incorrect. When there are functional silos, teams have a hard time operating outside of the normal process flows of a business.
 - b. Incorrect. When a business is not profitable, the management group is more likely to shut down teams if they cannot improve profits in the short term.
 - c. Incorrect. When there are many work rules, it is difficult for teams to propose adjustments that conflict with those rules.
 - d. **Correct. When managers are already in the habit of asking others for an opinion, they can transition more easily into a team leader role.**

Chapter 2 – Team Development

Review Answers

1. The following segments are involved in the ramp-up period for a new team, except for:
 - a. Settling in
 - b. Electing officers
 - c. Introductions
 - d. Coming together
 - a. Incorrect. The settling in segment involves a certain amount of jostling among the team members to determine roles.
 - b. **Correct. Teams do not elect officers. There is a team leader, who is assigned by management.**

Answers to Course Questions

- c. Incorrect. The introductions segment gives new team members time to chat informally and discuss various issues.
 - d. Incorrect. Coming together is the most productive segment for a team, when the group tightens its focus on attaining the goal.
2. A team with a high level of emotional intelligence should have:
 - a. A strong level of introversion
 - b. Authority to kick conflicts up to the team leader
 - c. Identification with their home departments
 - d. Strong motivation
 - a. Incorrect. A team should have strong communication skills, which may be present in introverted or extroverted people.
 - b. Incorrect. A team should have the ability to resolve conflicts on its own, which requires dealing with issues openly.
 - c. Incorrect. Team members should strongly identify with the team, which builds energy to overcome team obstacles.
 - d. **Correct. A team should be strongly motivated toward putting all possible resources into the team goal, pushing each other to keep working.**
3. The following activities can be used to enhance conflict resolution:
 - a. Have a fair process
 - b. Argue based on the facts
 - c. Hire an arbitrator
 - d. Use humor
 - a. Incorrect. Both sides are more interested in discussing a resolution when they perceive the process to be a fair one.
 - b. Incorrect. The arguments associated with a conflict can most easily be settled by focusing on the facts, not unsupported opinions.
 - c. **Correct. An arbitrator is only brought in to settle disputes between unrelated third parties. They are not used in a team environment.**
 - d. Incorrect. A dash of humor can defuse the stress associated with making decisions.
4. To achieve the best results, a high-performance team should be organized or managed in the following way:
 - a. Back off and let the team members work on their own
 - b. Spread them out physically
 - c. Publicize the members of the team
 - d. There should be an even mix of “A” and “B” players
 - a. Incorrect. The team leader can demand excellence, or encourage a large number of viewpoints. Either approach can yield excellent results.
 - b. Incorrect. Team members should be packed in, so that they can continually interact.
 - c. **Correct. “A” players have large egos, so publicly recognize the part that each one is playing on the team.**
 - d. Incorrect. The team should be comprised of “A” players, who can feed off each other’s energy and ideas.

Chapter 3 – Team Management Review Answers

1. The following behaviors are useful for a team leader, except for:
 - a. Distribute information
 - b. Own the planning process
 - c. Be calm
 - d. Follow through
 - a. Incorrect. A good team leader is always digging up information that the team can use, and pushing it out to the team.
 - b. **Correct. Planning should be pushed down to the team, since the team members are in the best position to know roles and responsibilities.**
 - c. Incorrect. A team manager should remain calm in the quite tense team environment, which can settle down the entire team.
 - d. Incorrect. The team leader must follow through on all commitments made to the team, which builds the team's trust in the leader.

2. The following is a valid coaching skill that a team leader can employ:
 - a. Share in the work
 - b. Give feedback
 - c. Send out members for mentoring
 - d. Make the team a fun place to work
 - a. Incorrect. A team leader cannot be coaching if he is engaged in detailed task work.
 - b. **Correct. Giving employees feedback about their performance on the team is an important coaching skill, since it can redirect people who were not focused on the correct tasks.**
 - c. Incorrect. A coach should mentor the team members directly. Arranging for outside mentoring is still of assistance to team members.
 - d. Incorrect. A team is supposed to achieve a goal, which may not result in a fun work environment, especially if the timeline is very tight.

3. A self-directed team has the following characteristic:
 - a. Information is directed at only those members who need it
 - b. A series of regimented meetings
 - c. A small number of job descriptions
 - d. A hierarchical management structure
 - a. Incorrect. Information is broadly shared in a self-directed team, so that everyone can assist with its management.
 - b. Incorrect. There tend to be a large number of short and relatively informal meetings, designed to ensure that all team members are progressing in the same direction.
 - c. **Correct. There are few job descriptions, since each person is expected to take on multiple tasks.**
 - d. Incorrect. A self-directed team has a flat organizational structure, since everyone is sharing in the work previously handled by a manager.

Chapter 4 – Team Decision Making Review Answers

1. The following are steps in the consensus building process, except for:

Answers to Course Questions

- a. Look for commonalities
 - b. Settle differences
 - c. Address all options
 - d. Choose sides
-
- a. Incorrect. Looking for commonalities allows people to see which elements of their favorite choices are actually present in other alternatives.
 - b. Incorrect. The final step in the process is to settle differences, where any residual differences between the choices are discussed.
 - c. Incorrect. The first step in the process is to lay out all possible options for the team to discuss, so that the broadest possible view can be obtained.
 - d. **Correct. If team members choose sides, this means that opinions are being deliberately polarized around a few alternatives, which makes it more difficult to reach a consensus.**

Chapter 5 – Dispersed Teams

Review Answers

1. The ___ form of communication may not work well when work products are on a tight deadline.
 - a. Face-to-face
 - b. Videoconferencing
 - c. Conference call
 - d. E-mail
 - a. Incorrect. Face-to-face communication is excellent when there is a tight deadline, since decisions can be made on the spot.
 - b. Incorrect. Videoconferencing is a good choice for obtaining information quickly, though there can be a modest delay while the call is being set up.
 - c. Incorrect. Attendees may not pay sufficient attention when they are on a conference call, but at least information is being sent in real time, so that immediate answers can be obtained.
 - d. **Correct. E-mail may not be answered for hours, which could seriously delay the completion of a project.**

2. The following issues with a multicultural team can interfere with a project, except for:
 - a. Language fluency
 - b. The treatment of authority
 - c. A large travel budget
 - d. The use of humor
 - a. Incorrect. If a person's language fluency is poor, he or she may be shunted aside or ignored.
 - b. Incorrect. Different cultures have different views of how to defer to managers (or not), which can result in some people not voicing their opinions.
 - c. **Correct. When there is enough funding to bring the team together for in-person meetings, this can greatly improve the subsequent interactions of the team.**
 - d. Incorrect. A supposedly humorous comment can be taken the wrong way by someone with a different cultural background.

Glossary

C

Collaboration. The act of working with others to generate an outcome.

Consensus. General agreement to support a decision.

D

Deviant. A person who is willing to publicly point out flaws in the current strategy, along with possible repercussions.

Dispersed team. A team whose members work from distant locations.

E

Emotional intelligence. The ability to recognize different types of emotions, and to use this knowledge to guide one's decisions and behavior.

S

Self-directed team. A team that has no managing team leader. Instead, members share management responsibilities.

Statement of work. A document that acts as a roadmap for a team, stating where it is going and how it will get there.

Subject matter expert. An acknowledged authority in a specific area of expertise.

T

Team. A group of people with complementary skills that works together to attain a specific goal.

W

Work group. A group of people who work together, but who are not interdependent.

Index

Backup planning	18	Treatment of teams	32
Budgeting	34	Management teams	4
Coaching skills	30	Milestone analysis	33
Collaboration issues.....	14	Multicultural issues	49
Communication systems.....	14	Ongoing activity teams	4
Conflict resolution.....	19	Polarization	42
Conformity.....	41	Recommendation teams.....	3
Consensus building.....	40	Reporting.....	35
Counterproductive behavior.....	20	Reward systems.....	23
Customer account teams	5	Scaling issues	7
Decision cascades.....	42	Self-directed teams	35
Decision making process	39	Socialization.....	21
Design teams	4	Statement of work.....	12
Deviant thinking	42	Status meetings.....	33
Dispersed team		Subject-matter experts	18
Communication.....	47	Success factors	25
Leader of.....	49	Team	
Management.....	45	Duration of.....	24
Rules.....	48	Engagement	17
Size of.....	48	Measurements	33
Effective team characteristics	25	Optimum number of.....	6
Emotional intelligence	15	Purpose of.....	9
Faulty decisions.....	41	Sizing.....	11
Group pressure	41	Structure.....	12
High-performance team.....	23	Termination.....	24
Incentive compensation	22	Training	17
Ineffective teams	9	Transitions	13
Listening skills	30	What is a	1
Management		When not to use.....	2
Behavior.....	29	When to use	2
Group interface	31	Team players	5
Style.....	28	Time zone issues	50
		Work assignments	13
		Work group	1
		Work load.....	13