

## ***CROSS-FUNCTIONAL TEAMS***



**INSTRUCTOR GUIDE**  
**4-HOUR COURSE**

**HRDQ<sup>®</sup>**

***CROSS-FUNCTIONAL TEAMS***



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# Instructional Design and Learning Philosophy

We are committed to providing the best core skills content possible for Instructor-Led Training (ILT). The following principles are applied in the development of programs:

## Sound Instructional Design

All course content is developed using a variety of research techniques. These include:

- Brainstorming sessions with target audience
- Library research
- Online research
- Customer research (focus groups, surveys, etc.)
- Subject Matter Experts (SME)
- Interviews with trainers

Expert instructional designers create imaginative and innovative solutions for your training needs through the development of powerful instructional elements. These include:

- Learning objectives — effective tools for managing, monitoring and evaluating training
- Meaningfulness — connects the topic to the students' past, present and future
- Appropriate organization of essential ideas — helps students focus on what they need to know in order to learn
- Modeling techniques — demonstrate to students how to act and solve problems
- Active application — the cornerstone to learning — helps students immediately apply what they have learned to a real-life situation
- Consistency — creates consistent instructions and design to help students learn and retain new information
- Accelerated learning techniques — create interactive, hands-on involvement to accommodate different learning styles

## Application of Adult Learning Styles

Adults learn best by incorporating their personal experiences with training and by applying what they learn to real-life situations. Our experienced instructional designers incorporate a variety of accelerated learning techniques, role-plays, simulations, discussions and lectures within each course. This ensures that the learning will appeal to all learning styles and will be retained.

# Course timing

## Chapter 1: Laying the groundwork

Type of Activity	Segment	Time
	What are cross-functional teams?	20
	Determining necessary resources	15
	Writing a project plan	15



Reading



Written Exercise



Facilitate



Group Activity

## Chapter 2: Building and shaping the team

Type of Activity	Segment	Time
	Team characteristics	15
	Team roles	15
	Team expectations and standards	20
	Accelerating team building	10
	The influence of emotions	10
	Troubleshooting	10

## Course timing (cont.)

### Chapter 3: Doing the work

Type of Activity	Segment	Time
	Determine deliverables	10
	Matching team types and actions	20
	Case studies	20

### Chapter 4: Evaluating the performance

Type of Activity	Segment	Time
	Measuring the project's success	10
	Team assessment	5
	Assessing individual effectiveness	5



Reading



Written  
Exercise



Facilitate



Group  
Activity

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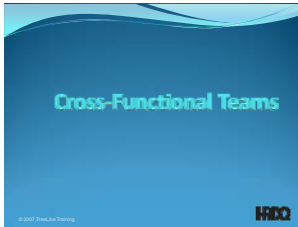
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Welcome group; introduce yourself and topic.



## Course objectives

Successful completion of this course will increase your knowledge and ability to:

- Determine when cross-functional teams are appropriate in your organization
- Develop a thorough and complete project plan
- Recognize the characteristics of an effective team leader and team members
- Set team expectations and standards by developing a team charter
- Set ground rules for how the team will function
- Assign formal team roles
- Accelerate team building to jumpstart the team's effectiveness
- Recognize symptoms that the team is not working well, and correct problems
- Measure the project's success in terms of the tasks accomplished and the process in which they were accomplished

# ChapterOne



## ***LAYING THE GROUND WORK***

Possible analogy for the day: Using cross-functional teams (CFT) successfully is like following a recipe: there are the ingredients (the team members) and the instructions. If either part has problems, the entire recipe could fail. So, a successful cross-functional team not only has the appropriate members, it also carries out its task(s) using practices or processes that ensure success.

**Icebreaker:** Break participants into small groups and have them answer the following questions: "What experiences have you had working on cross-functional teams?" "What were its strengths?" "Weaknesses?" If participants have no experience (unlikely), ask them what they would expect the strengths and weaknesses to be. This is also an opportunity to surface any misconceptions about what a cross-functional team is and isn't.

Cross-functional teams aren't:

- A work group
- Permanent/stagnant
- Cross-training

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Debrief by sharing with the group at large and tying answer to the program objectives.

# Introduction

What experiences have you had working on cross-functional teams?

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What made it cross-functional?

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What were its strengths?

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What were its weaknesses?

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## What are cross-functional teams?

Involve a range of functions

Usually temporary or have periodically changing purpose or team members

Created to solve a problem, improve a process, design or create something

Depend on one another to achieve goal

Empowered to make decisions and execute actions

### Selection criteria

Will result in greater productivity or increased profits

*Or* will result in higher quality or reduced waste

*Or* is necessary for the continued success of the organization

*And* has or would have upper level management support

*And* team members will have adequate time and resources to devote to project

Cross-functional teams have led to the discovery and commercial success of:

Tagamet

Viagra

Kevlar

Give examples of successes and failures using CFT. The chemical and pharmaceutical industries have successfully migrated from traditional, specialized research groups to cross-functional teams focusing on lead generation and optimization. CFTs have also been used successfully to streamline operations and implement solutions to specific problems.



Once a decision has been made that a CFT is necessary, the next step is to determine the scope of the resources required. These can be divided into two categories: people and physical.

**People resources:**  
The team sponsor is an upper level manager assigned to the team. He or she champions the team. Specifically, that means supporting the team by doing the things listed in the workbook.



Obviously, the most critical aspect of a successful cross-functional team is its membership. To assemble the best team, look beyond the most obvious choices (such as star performers—they may not be the best team performers). The workbook lists sources to consider.

Another consideration of people resources is whether workloads will need to be shifted, and if so, to whom.

Also consider external resources: some cross-functional teams may need to seek people from outside the organization for a particular skill set or expertise, or to provide training.

**Physical resources:** A CFT will need, at a minimum, a space to meet (and ideally to work), supplies, materials and equipment.

# Determining necessary resources

## People

### Team sponsor

- Authorizes resources and time
- Provides direction and guidance so the team meets its goal
- Coaches the team leader/project manager
- Holds the team accountable
- Run interference and remove obstacles
- Recognize and reward team accomplishments

### Team membership sources

- Ask functional leaders
- Obtain peer recommendations
- Review individual activities and accomplishments
- Get customer (internal and external) input
- Ask for volunteers

### Consultants/advisors (internal or external)

- Present training
- Provide functional expertise

## Physical

- Space/facilities
- Equipment
- Supplies/materials

# Writing a project plan

## Statement of purpose

- Supports or aligns with organization mission
- Shows benefit or positive outcome
- States specific, identifiable end point

## Establishing a timeline

- List all major activities required to complete the project
  - Organizing and forming
  - Doing the work
  - Following up
- Estimate time realistically
  - Identify fixed deadlines
  - Determine the earliest time an activity can begin (including any predecessor tasks)

$$T_e = \frac{T_o + (4T_m) + T_p}{6}$$

$T_e$  = *estimated time*

$T_o$  = *the most optimistic time*

$T_m$  = *the most likely time, based on experience*

$T_p$  = *the most pessimistic time (everything goes wrong)*

A written project plan gives the CFT credibility, as well as serving as a blueprint to help ensure the project maintains its direction and scope.

It has three main parts: the statement of purpose, a timeline and a budget. It is impossible to give specific information for what these should look like since they will be unique to each project and team.

The statement of purpose should be specific and results oriented.

Establishing a realistic timeline can be one of the trickiest parts of the project plan. The bottom of the workbook (and the overhead) shows how to calculate a weighted average time estimate that considers the best and worst case scenarios, and most likely timeframe.

Weighted average time estimate

$$T_e = \frac{T_o + (4T_m) + T_p}{6}$$

$T_e$  = *estimated time*  
 $T_o$  = *the most optimistic time*  
 $T_m$  = *the most likely time, based on experience*  
 $T_p$  = *the most pessimistic time (everything goes wrong)*

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Weighted average time estimate

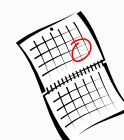
$$T_e = \frac{T_o + (4T_m) + T_p}{6}$$

$T_o$  = 15 days  
 $T_m$  = 20 days  
 $T_p$  = 30 days  
 $T_e$  = ?

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Causes of poor time estimates



- Inexperienced guessers
- Changes in project scope
- Creeping loss of enthusiasm
- Company politics
- Completely unforeseen circumstances

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The workbook listed a variety of budget considerations. Experienced project managers budget extra funds for cross-functional teams because of the additional coordination and communication that's required.

## Writing a project plan (cont.)

### Developing a budget

#### Considerations

Cost of taking people away from their "regular" jobs for the length of time it will take to complete project—initial start-up, preparation, team-building, performing tasks, gathering data, meeting, following up, etc.

Management and coaching input—cost of management's time to brief, train, coach, run interference, communicate

Obstacles resolution—cost of dealing with conflict, resistance to change, unwillingness to share information, reluctance to take risks, etc.

Rewards and recognition—anything of monetary value that will be awarded to the team

Expenses—field trips, site visits, research, lunches, outside consultants, etc.

Where expenses will be accounted for—new line items, etc.?

#### Categories

Direct costs

Indirect costs

Contingency fund

## Project plan template

<b>Introduction</b>
<i>Insert brief overview statement, answering the question: What is the team's goal?</i>
<b>Objectives</b>
<i>List objectives, usually in bullet form. Note what changes are expected to result from this team, and how these changes will benefit the organization. Also note measures of success.</i>
<b>Deliverables</b>
<i>List the concrete work products — i.e., deliverables — that the team will produce.</i>
<b>Scope</b>
<p>Within the scope of the group are the following tasks:</p> <ul style="list-style-type: none"> <li>▪ <i>List the tasks the team will accomplish.</i></li> </ul> <p>Outside the scope of the group are the following tasks:</p> <ul style="list-style-type: none"> <li>▪ <i>List the tasks that are clearly outside of the team's authority, which the team will not accomplish.</i></li> </ul>

<b>Assumptions</b>
<i>List any assumptions and/or other considerations.</i>
<b>Schedule and duration</b>
<i>List the lifecycle/duration of the team, as well as key dates and major milestones. This schedule could be backed up by a project plan. Note that if the duration of a team is longer than six (6) months, then a team should include a "rechartering date" as a milestone.</i>
<b>Team resources</b>
<i>Describe required team member resources. If appropriate, note what team roles are required and the time commitment for each role. If appropriate, list the skills and competencies required to accomplish the work of the team.</i>
<ul style="list-style-type: none"> <li>▪ <b>Chair/Team Leader</b> [name]</li> <li>▪ <b>Team Members/Representatives</b> [names]</li> </ul>
<b>Additional resources</b>
<i>List any additional resources that are required and/or available to the team, such as facilitation, sites/team rooms, etc. Note what resources are required and/or available if a team member needs backfilling.</i>

<b>Metrics</b>
<i>Describe how the team will measure its success.</i>
<b>Communication</b>
<i>Describe how the team will communicate with stakeholders, sponsors, and other interested parties. If appropriate, include a brief stakeholder analysis and associated communicated channels and reporting schedules.</i>
<ul style="list-style-type: none"> <li>▪ Team email: <i>(list addresses)</i></li> <li>▪ Team website: <i>(list address)</i></li> </ul>
<b>Oversight and commitment path</b>
Note what individuals and/or groups need to review/approve the team's work.
<b>Signature of sponsor:</b>
Name (printed):
Signature:
Date:








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