

MANAGING TEAMS



INSTRUCTOR GUIDE **1 DAY COURSE**

HRDQ[®]

MANAGING 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

Module One: Building a Solid Foundation

Type of Activity	Segment	Time
	Introduction	20
	The team management model	10
	Resource considerations	10
	Developing a team charter	30
	Developing and using a project plan	20

Module Two: Defining Team Roles and Styles

	Clarifying the team members' roles	10
	Productive team member roles	5
	Destructive team member roles	10
	Personal style	20

Course timing (cont.)

Module Three: Effective Team Leadership and Support



Leading is coaching

5



Defining leadership responsibilities

10



Team leader as team coach

15



Building trust as a leader

10



Team management rating assessment

15

Module Four: Managing an Efficient Team



Efficient team management

5



Team communications

10



Conducting meetings efficiently

20



Team accountability chart

10

Course timing (cont.)



Checking progress

15



Making decision-making matter

35

Module Five: Avoiding the Pitfalls



Handling conflict

15



Communication issues

10



Troubleshooting

15



Ten guidelines for getting your team back on track

10

Module Six: Fostering Future Success



Measuring the team's success

10



Team assessment

10



Assessing individual effectiveness

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Rewarding accomplishments

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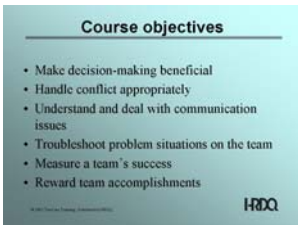
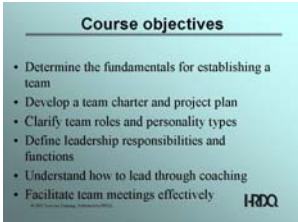
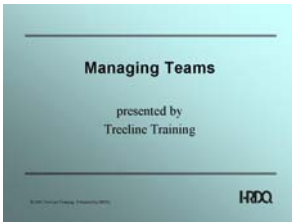
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Course objectives

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

- Determine the fundamentals for establishing a team
- Develop a team charter and project plan
- Clarify team roles and personality types
- Define leadership responsibilities and functions
- Understand how to lead through coaching
- Facilitate team meetings effectively
- Make decision-making beneficial
- Handle conflict appropriately
- Understand and deal with communication issues
- Troubleshoot problem situations on the team
- Measure a team's success
- Reward team accomplishments



ModuleOne



BUILDING A SOLID FOUNDATION

Welcome group; introduce yourself and topic.

Opening activity: Broken squares. Divide participants into groups of six and tell them they will be completing an activity that will demonstrate the challenges of working in a team environment. See Trainer Supplement for complete instructions for conducting the activity.

Debriefing questions: The usual answer to the question, "How many were frustrated?" is, "I couldn't communicate." Suggest this is not true, but rather their normal patterns of communication were disrupted. They could communicate by giving away appropriate pieces.

If observers noted that participants mentally dropped out after they had completed their square, suggest that for westerners with an individualistic orientation, we hear the instructions as individuals. Not everyone hears them this way.

Principles of group cooperation:

Each individual must understand the total problem—the big picture.

Each individual should understand how he or she can contribute toward solving the problem.

Each individual should be aware of the potential contributions of other people and obstacles they may face.

Introduction

Broken squares

Debriefing questions

How did you feel during the exercise? Why?

How many were frustrated? Why?

Ask the observers if anyone mentally dropped out when they had completed their square? Why?

Was there any critical point at which the group started to cooperate? What was the cause?

What are some principles for successful group cooperation?

How was trust developed or broken down within the whole group?

What was necessary to build trust within the group context?

The team management model

Managing a team can be one of the most challenging, yet rewarding, experiences you will have in the workplace. Finding the balance between directing and supporting is always one of the most difficult functions of the manager. Teamwork is unsuccessful if the leader is continually putting forth ideas before anyone else on the team. Many times a team leader will need to sit back and listen, or allow others to control the process of decision making in order for the team to feel that they are empowered and trusted to accomplish their goals. A good team manager will ORGANIZE, COACH, and EXECUTE



Throughout the workbook, this model will help you develop and manage a highly successful team. The first component: ORGANIZE, will walk you through the steps to building a solid foundation for your team and its members.

To begin organizing your team you will need to:

- Identify appropriate resources
- Develop a team charter
- Write team objectives
- Develop and use a project plan
- Identify the best personality types for your team
- Assign appropriate roles to team members



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



Human resources:

The team manager is usually, but not always, 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 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).

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

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

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

Resource considerations

Human resources

Issues to consider as a team manager

- Knowledge of the goals and mission of the team
- Ability to acquire needed resources, both physical and human
- Ability to network outside relationships
- Ability to identify obstacles the team will face
- Ability to provide guidance and support as needed

Issues to consider as a team member

- Ability to obtain the skills and knowledge to perform a needed role on the team
- Ability to work well with others
- Level of motivation toward finishing the intended team goals

Factors to consider at the advisor level

- Ability to present training
- Ability to provide functional expertise

Physical resources

- Space/facilities
- Equipment
- Supplies/materials

Developing a team charter

The first step in structuring a successful, high performance team involves every member contributing toward the goals and direction of the team. Even teams that have worked together before may have to revisit this step in the process several times to ensure they are all heading in the same direction. At the beginning, the focus can remain general and brainstorming is welcome.

Writing team objectives

Step 1: Brainstorm your ideas about the team's vision

Step 2: Prioritize the ideas

Step 3: State the facts

Step 4: Write your team objectives

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

It has three main parts; the objectives, 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 objectives should be specific and results oriented.



A vision statement is the “big picture” of why the team has been created; a, “Where do we want to be when we are finished.” Example: “We will be the preferred supplier of multi-colored beach balls in North America.”

Emphasize what the team needs to accomplish and what results are expected.

One to two objectives are usually enough for the team project. Any more than that usually means that the scope of the project is too big.

Explain that involving the entire team in the writing of objectives is important to get all team members on the same track. Many times members will be placed on a team with very different ideas about what the team should be doing. The team charter helps you (the manager) coach the team in the same direction.

Writing team objectives(cont.)

Step	Questions to ask
Brainstorm your ideas about the team's vision	Why was this team created? How do we want this team seen by the organization? Where do we want this team to be headed in the future? Is our vision... easy to understand? challenging? capable of evolving?
State the facts	What is the budget for this project? What are the deliverables for the project? What kind of authority does the team have?
Prioritize your ideas	What does the team feel are the most important ideas generated? Do these ideas take into consideration the organizational guidelines? Do the ideas balance task and team development?
Write your team objectives	What words reflect the team's objectives? Do the objectives reflect the vision of the team?

Developing your team charter (cont.)

Determining deliverables

- What outcome is expected from the project?
- What output (product or service) does the team need to deliver?
- What interim milestones must be met?
- What continuing product or service is sought?
- What else is required of the project?

Establishing a time line

- 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)
- Use a weighted average to calculate time

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

- 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)

Deliverables are the tangible results that will be produced by the team. The deliverables should be as specific as possible. Use the questions on this page to focus your thinking.

Establishing a realistic time line can be one of the trickiest parts of the project plan. The bottom of the page shows how to calculate a weighted average time estimate that considers the best and the worst case scenarios, and the most likely time frame. Show the PPT, and have the group calculate the estimated time. Answer = 20.8 days (15 + 80 + 30 = 125/6).

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)

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 = ?

Review the causes of poor time estimates shown on the PPT.

Causes of poor time estimates

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

The workbook lists a variety of budget considerations. Experienced project managers budget extra funds because of the additional coordination and communication that are required.

Developing your team charter

Developing a budget

Considerations

Cost of taking people away from their “regular” jobs for the length of time it will take to complete a 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.

Contingency fund — 15 percent is a reasonable amount

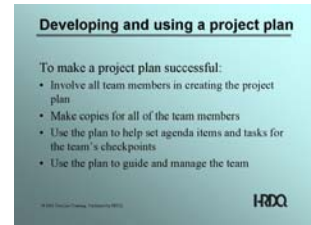
Developing and using a project plan

To make a project plan successful:

- Involve all team members in creating the project plan
- Make copies for all members of the team
- Use the plan to help set agenda items and tasks for the team's checkpoints
- Use the plan to guide and manage the team

Project plan template

Project name
<i>Insert brief overview statement, answering the question: What is the team's goal?</i>
Team objectives
<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>
Deliverables
<i>List the concrete work products — i.e., deliverables — that the team will produce.</i>



Activity: Have participants work in small groups. Ask them to identify a task or a project they might/will be working on as a team or team manager, and then have them fill in as much information in the project plan as they can. It is likely that each group won't be able to complete all the information; the idea is to get participants thinking about these aspects that make up a complete project plan.

Checkpoints

Within the scope of the group are the following tasks:

- *List the tasks the team will accomplish.*
- *List when each of these tasks should be completed.*

Outside the scope of the group are the following tasks:

- *List the tasks that are clearly outside of the team's authority, which the team will not accomplish.*

Project completion date

Insert the completion date for each deliverable listed

Additional resources

List additional physical or human resources needed to complete the team's objectives

Manager signature

Manager signature:






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