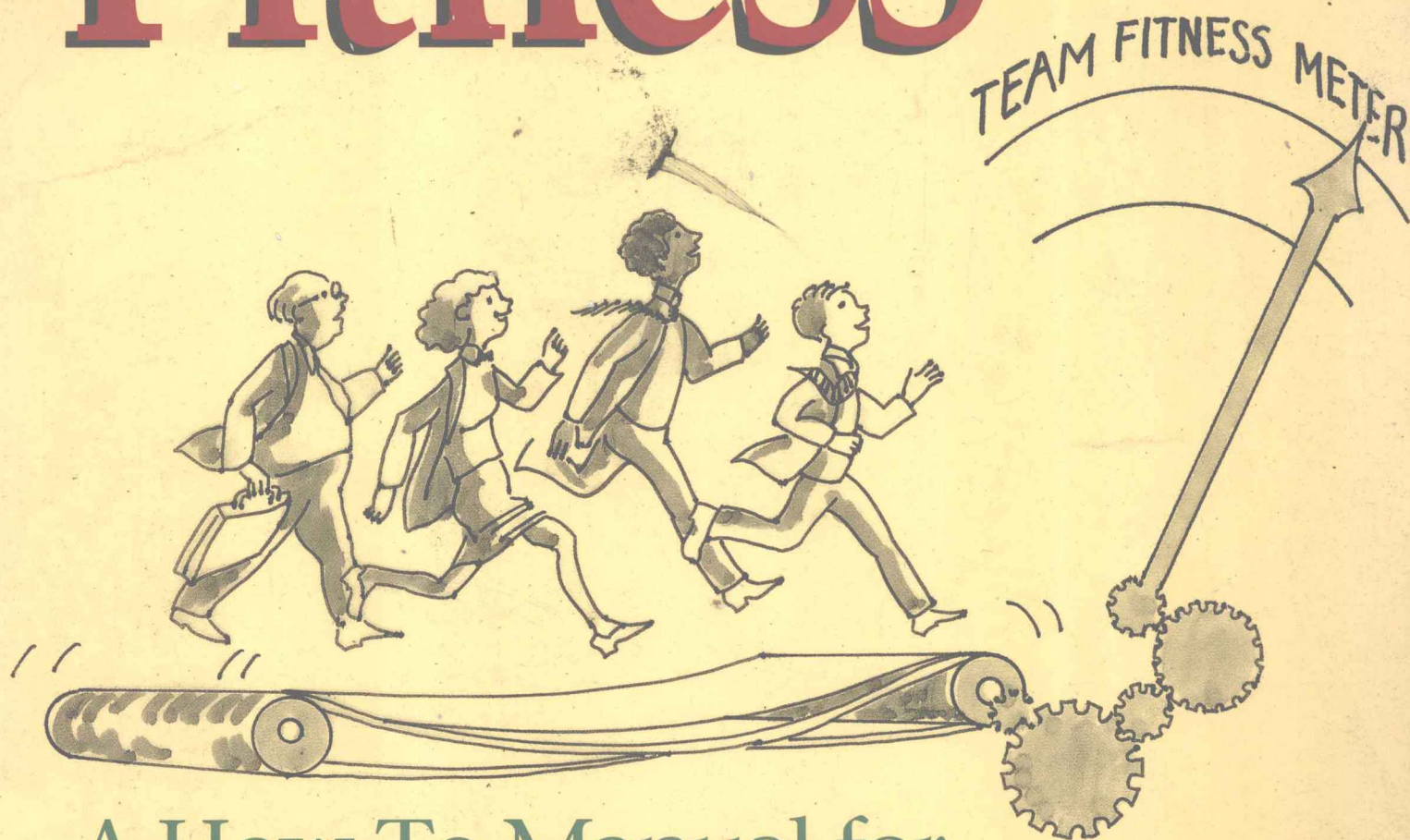


Team Fitness



A How-To Manual for
Building a Winning Work Team

Meg Hartzler and Jane E. Henry, Ph.D.

TEAM FITNESS

A How-To Manual for Building a Winning Work Team

Meg Hartzler

Jane E. Henry, Ph.D.

ASQC Quality Press
Milwaukee, Wisconsin

Team Fitness: A How-To Manual for Building a Winning Work Team
Meg Hartzler and Jane E. Henry, Ph.D.

Library of Congress Cataloging-in-Publication Data

Hartzler, Meg

Team fitness: a how-to manual for building a winning work team/
Meg Hartzler, Jane E. Henry.

p. cm.

Includes bibliographical references and index.

ISBN 0-87389-269-0

I. Work groups. I. Henry, Jane E. II. Title.

HD66.H375 1994

658.4'02—dc20

93-48626

CIP

©1994 by Meg Hartzler and Jane E. Henry, Ph.D.

All rights reserved. No part of this book may be reproduced in any form or by any means, electronic, mechanical, photocopying, recording, or otherwise, without the prior written permission of the publisher.

You may copy any pages that are titled *Information Sheet* or *Worksheet* to make it easy for all your team to participate. (Permission is granted only for your own team's use.)

10 9 8 7 6 5 4 3 2 1

ISBN 0-87389-269-0

Acquisitions Editor: Susan Westergard

Project Editor: Kelley Cardinal

Production Editor: Annette Wall

Marketing Administrator: Mark Olson

Set in Berkeley and Stone Sans by Montgomery Media, Inc.

Cover design by Montgomery Media, Inc.

Printed and bound by BookCrafters, Inc.

ASQC Mission: To facilitate continuous improvement and increase customer satisfaction by identifying, communicating, and promoting the use of quality principles, concepts, and technologies; and thereby be recognized throughout the world as the leading authority on, and champion for, quality.

For a free copy of the ASQC Quality Press Publications Catalog, including ASQC membership information, call 800-248-1946.

Printed in the United States of America



Printed on acid-free recycled paper



ASQC
Quality Press
611 East Wisconsin Avenue
Milwaukee, Wisconsin 53202

Foreword

The modern organization has arrived! Instead of building on individual competencies and roles, it is built on teams. Teams are central to all types of organizational processes, ranging from customer relationships to quality efforts to cycle time reductions to manufacturing excellence. Knowing the importance of teams and being able to effectively use teams are two different issues.

Team Fitness is one of the most practical, useful, and valuable guidebooks to making teams work. The book is about doing, not talking; about making teams more fit, not providing theory about teams; about concrete actions for teamwork, not abstract ideals. The four steps to fitness (customer focus, direction, understanding, and accountability) represent the building blocks of effective teams. The exercises and tools in the book provide every manager from the senior executive to the first line supervisor with practical ways to make teams more effective.

Managers should not just read this book, but use and digest it. If the exercises are followed, managers will build more healthy organizations. It is a diet most managers cannot live without.

Dave Ulrich
Clinical Professor, School of Business Administration
University of Michigan

Acknowledgments

Writing this book has consumed a good portion of our time and energy. Thank goodness we had support, editing, help, and inspiration from many others. These are the people we want to thank.

Our colleagues at Destra, Dr. Pamela Dennis and Laurie Dodd, found time when there was none to do in-depth editing and input in many areas. Destra assistants Ruth Eastman and Shawna Lechuga organized the word processing and kept calm when we were not.

Other invaluable editors include Jan Swartz, Meg's sister, principal of Burkholder Middle School, Las Vegas, Nevada; Steen Jensen, principal, High 5 Consulting, formerly with Northern Telecom; William J. Martin, turn-around CEO; Maurice (Moe) Russell, vice-president of branch lending in four midwestern states, Farm Credit Services of the Midlands; Dr. Dodds Buchanan, marketing professor, University of Colorado; and Reg Gupton, realtor and trainer.

Some people encouraged us and took the model to the test of their team situations. They are Ken Lichtenstein, Susan Walden, Kit Connelly, Karen Regg, and Tim Fidler of GE Plastics, and Marvin Hass and his self-directed work teams in Farm Credit Services of Southeast Kansas.

Support and encouragement also came from Jane's colleagues at the Farm Credit Council including Kurt Ronsen and Michael Hotz, who also edited; Rosalie Holen, who helped with sanity and organization; Dean Lehman, Roger Shaffer, Connie McAndrews, and Crystal Munday-White, who gave moral support.

Our Vision

Our vision for this book-writing project was to use our best thinking and experiences to put together a manual that is readable, practical, personal, straightforward, and takes the mystery out of how to build an effective team.

Our vision for its use is that this text will become dog-eared, coffee-stained, and yellow highlighted, with its corners folded down, and falling open naturally to certain pages.

Jane and Meg

Others who lived through the pushes and deadlines side-by-side with us were Dale and Jeff Hartzler; Kristen and Kevin McCormick; David and Elise Hoerath; Claire Lindgren; Dorcas Murray; Bruce Jacobson, Larry Rosen, Ed Webster, Jordan Campbell, and Meg's partners, Pam and Laurie.

Marvin Weisbord and David Ulrich provided inspiration to Jane. Meg appreciates Eileen Morgan and Sandra Hirsh who pushed her to write.

Mary Lou Egan was our gracious, conscientious, and clever illustrator, whose drawings helped enliven the pages.

Thanks to the people who let us use their visions and values—Dave Woolfolk, Jim Styck, Rolf Haugen, and Mike Davis.

Especially, we want to thank the countless teams we have worked with over the past years, those with which we consulted, participated in, and led. Truly, we could not have done it without you. Thanks!

Good luck with your teams!

Introduction

THE CHALLENGE

- Bill Rogers' department has just been asked to be a pilot site for the company's new quality program.
- Engineer, Mark Garcia, received a memo today appointing him to a cross-functional work team.
- Elaine Watson is charged with determining the causes of variance on her assembly line.
- George Swartz is promoted to manage an existing work group.
- Donna Yamamoto wants to renew and invigorate her work team.
- Jim Jeffries is the new chairman of the board of directors of United Way.

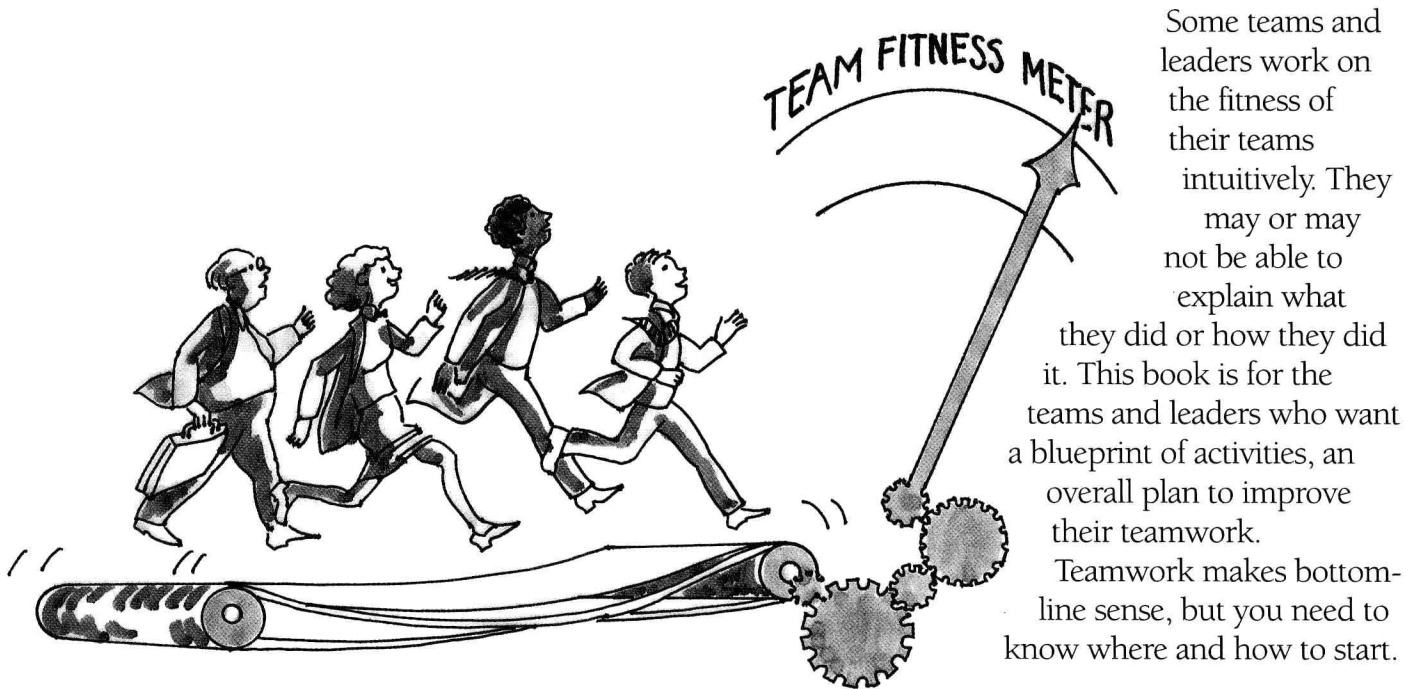
Teamwork Trend

Self-directed teams have been empowered with responsibility for all functions at companies like Steelcase, Northern Telecom, and Johnsonville foods. Results from Northern Telecom Morrisville factory: revenue increase—63%; sales—26%; quality—50%; productivity per employee—60%; earnings—46%.

J. Schidler, "Work Teams Boost Productivity," *Personnel Journal*, February 1992, 67–71.

As the reader, you probably selected this book because you are interested in the possibilities of building a team in your workplace. This process is happening throughout the United States and the world. Today, as never before, front-line supervisors, managers at all levels, and leaders in all kinds of organizations are being called upon to build teams to meet their companies' unique needs. Teams are required to produce quality products and services for today's competitive environment.

Everyone is part of one or more teams. Roles shift as individuals move from one team to another. One may be the leader of a business unit at work and a member of a task team for the chamber of commerce in the evening. People may lead a group at church, a favorite nonprofit organization, or their children's school, in addition to the work teams of which they are part every day. Our lives are touched by teamwork, or the lack of it, at every turn.



Some teams and leaders work on the fitness of their teams intuitively. They may or may not be able to explain what they did or how they did it. This book is for the teams and leaders who want a blueprint of activities, an overall plan to improve their teamwork. Teamwork makes bottom-line sense, but you need to know where and how to start.

The challenge.

When you and your team are fit, you will be rewarded by the synergy and pride that comes as team member energy is released. Creative team decisions will blossom and you will gain focus and commitment to the team and the organization. You will see the results.

Teamwork is rewarding and exciting!

This book is a guide to help you develop a strategy and plan for your team. It is a step-by-step approach to diagnosing the team's needs, planning for team activities, and carrying out those activities.

Four major areas are key to developing a systematic approach to achieving successful team performance. The activities and exercises of *Team Fitness* are organized around the following four areas:

1. *Customer focus*—Shape your products and services by identifying your primary customers and clarifying their needs and expectations.
2. *Team direction*—Create a vision for your team, define your unique mission, and gain a shared purpose.
3. *Understanding*—Identify individual team member strengths and blind spots. Find ways to understand and support each other and strategies for effective teaming. Make sure your team can get things done in the organization.
4. *Accountability*—Build agreement on “who does what around here;” develop team operating principles; and clarify values.

Team Fitness is based on research, theory, and the authors’ years of experience as members, leaders, and consultants to teams. This text provides the framework and exercises that are the essential elements for your team fitness program. In this manual you will find pragmatic, simple techniques and activities to raise your levels of productivity, profitability, and commitment.

Building a team is an ongoing process. Just as achieving optimum physical fitness requires dedication and training and practice, so does building a team. Any team can make improvements by choosing exercises that are short and straightforward, and then moving to more lengthy, tougher ones. Setting aside the time to focus on teamwork—to work out on a regular basis—is a requirement. *Team Fitness* will help you develop your own personalized plan and exercise schedule to get team fit.

A regional sales manager frequently found himself helping his sales people see the need to team.

In their discussions, he would use an analogy that comes from the notion of Best Ball golf. A scratch golfer often can shoot par (72) or better. Playing Best Ball, the foursome can score in the 60s consistently.

His challenge to his people, “How do we play Best Ball in sales?”



Building a team is an ongoing process.

What a group of visitors found when they went to GE's Business Information Center in Albany, New York, was paradoxical. For example,

- Productivity up 106 percent in three years. Cost per customer down 46 percent
- Employees who gave the impression they were in charge, but gave their manager high marks
- This transformation being accomplished in a service enterprise, not in manufacturing, where such known gains had more frequently been achieved

In a two-year period this business transferred ownership of the business to the employees and became a self-directed work team. They used a structured process of letting go of control to strengthen their worldwide position of leadership.

James Burnside, *Letting Go*, General Electric Company, 1992.

HOW TO USE THIS MANUAL

This book is a manual, a how-to book. It is designed for you and your team to use on your own.

- Step 1.* Read the fitness model section.
- Step 2.* Leaf through the entire workbook to understand the variety of exercises available.
- Step 3.* Assess your current fitness level. Take the Team Fitness Meter yourself. Give the Team Fitness Meter to the other members of your team. Score your Team Fitness Meter. Examine the results with your team.
- Step 4.* Develop a fitness plan and a workout schedule that allow for a steady pace to build the strength of your team over time.

The sequence of activities will vary according to factors such as how long the team has been together, scope of responsibilities; the culture of the enterprise. The format of the activities is similar to that of a physical workout, with an exercise plan, a warmup, aerobics, and a cooldown.

You may copy any pages that are titled *Information Sheet* or *Worksheet* to make it easy for all your team to participate. (Permission is granted only for your own team's use.)

Contents

Foreword	ix
Acknowledgments	xi
Introduction	xiii
The Challenge	xiii
How to Use This Manual	xvi
 Part 1 The Fitness Model	1
Fitness Area 1: Customer Focus	4
Fitness Area 2: Direction	5
Fitness Area 3: Understanding	6
Fitness Area 4: Accountability	7
 Part 2 The Fitness Meter	9
Characteristics of Effective Teams	11
Beginners, Intermediates, Experts	13
The Fitness Meter	14
Fitness Meter Score Sheet	19
Fitness Planning	24
 Part 3 The Exercises	27
Fitness Area I: Customer Focus Exercises	29
1. Who Is the Customer	32
2. Primary Customer Identification	34
3. Customer Feedback and Measures	39
4. Customer Priorities	41
5. What Do Our Customers Want and Expect from Us?	46
6. Moments of Truth	48

7. Moments of Truth Map	51
8. Customer Site Visits.....	55
9. Focus Groups for Internal or External Customers	60
10. Surveys.....	67
11. Tracking the Work	73
12. Walk a Mile in My Shoes	76
 Fitness Area II: Direction Exercises	79
1. Project or Task Team New Team Charter	84
2. Long-Term or Ongoing Team Chartering Meeting.....	89
3. A One-Day Visioning Meeting	94
4. Warm-Up Vision.....	97
5. Creating a Team Vision—with Pictures	99
6. Mission Statement	103
7. Short Mission Statement	108
8. Goals and Objectives Top-Down.....	114
9. Bottom-Up Goal Setting.....	118
10. Which Goals Have Priority?	121
 Fitness Area III: Understanding Exercises	127
1. In-Depth Intros.....	130
2. What Makes Us Tick?	136
3. How Do I Use My Time?.....	139
4. Are We a Team or a Work Group?.....	143
5. Observing Individual Behaviors in Teamwork.....	146
6. Consensus Decision Making	152
7. What Sport?	157
8. Ten-Minute Team Process	162
9. Process Check.....	165
10. Box and Bubble	167
11. Leadership Transition Meeting.....	170
12. Best Boss.....	174
13. Culture Audit	177
14. Culture Observation	181
 Fitness Area IV: Accountability Exercises	185
1. Values Statements	190
2. If—Then—Then.....	194
3. Operating Agreements	197
4. Negotiating Ground Rules	201
5. Individual Contracting	203
6. Team Responsibility Chart	207

7. ABC Priorities	211
8. Implementation Responsibility Chart.....	214
9. Stakeholder Support.....	217
10. Critical Success Factors	219

Appendices

Appendix A—Types of Teams.....	223
Appendix B—New Team Start-Up	225
Appendix C—How to Begin with an Existing Team.....	227
Appendix D—Teams and Time	229
Appendix E—Planning an Off-Site Team Fitness Session.....	231
Appendix F—Roles and Tasks of a Facilitator.....	235
Appendix G—Use of Flip Charts	237

Index.....	241
-------------------	------------

part one

THE FITNESS MODEL

A Four-Part Model

Effective teams are necessary to meet today's challenging business environment. In the competitive 90s, it is critical to unleash the power and creativity of all individuals to work toward the organization's goals. Teams need involvement from all members, they must be self directing on their key tasks, and must receive some support and guidance. For this to become a reality, teams must find the ways to work at their best.

To navigate through complex situations, conflicting demands, and limited resources, teams need fitness training and the tools to get things done. As shown in Figure 1.1, the four areas of team exercises and activities that help the team get fit are

- Customer focus
- Direction
- Understanding
- Accountability

Just as everyone knows it takes focus and commitment to maintain fitness through exercise, diet, and good habits, the team must dedicate time and energy to strengthen itself in each of these four areas. Let us examine these four fitness areas.

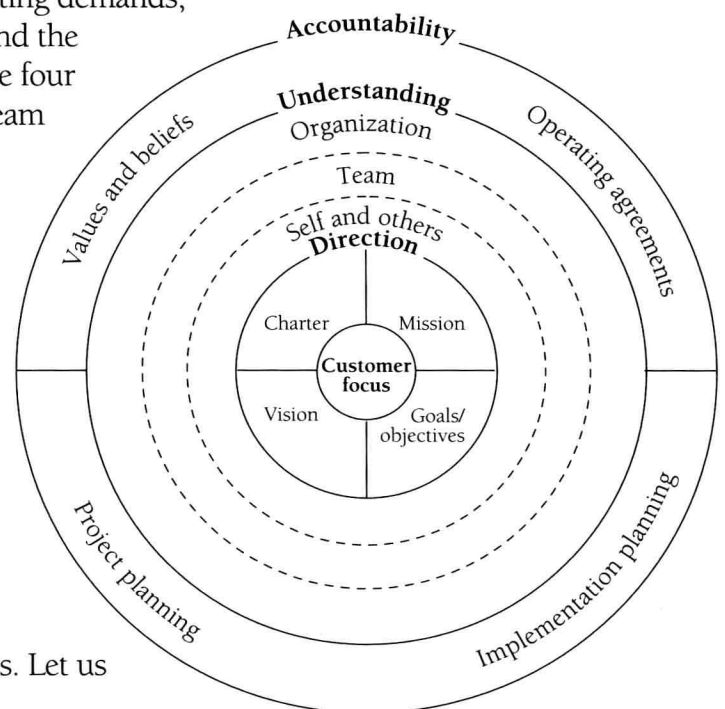


Figure 1.1. Team fitness.

FITNESS AREA 1: CUSTOMER FOCUS

Definition: Customer focus is getting clear on the expectations, values, and priorities of those who receive your work, and ensuring that those expectations shape the requirements for the products and services you provide.

Factors: Customer focus has two parts: identification of customers, and clarification of the customers' requirements and expectations.

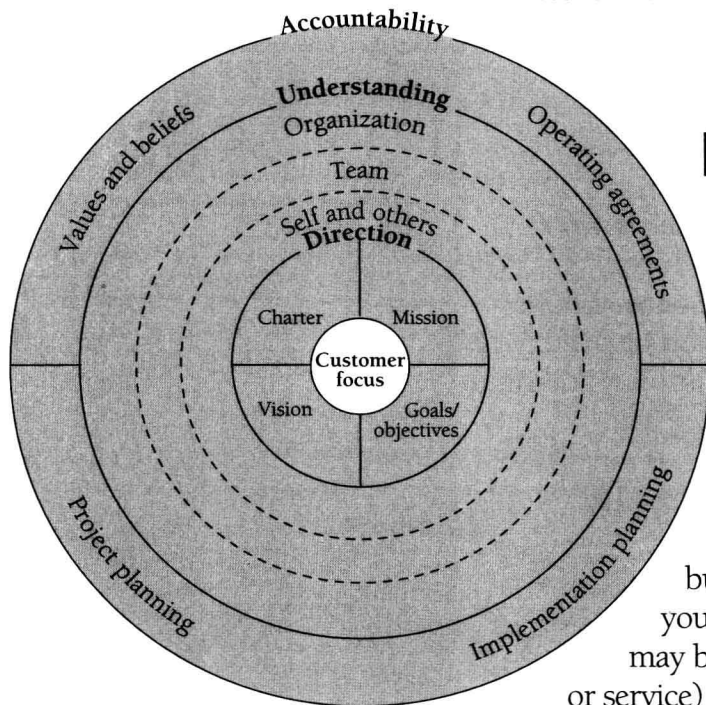


Figure 1.2. The first fitness area—customer focus.

How focusing on the customer contributes to team fitness

Customer focus is the heart of the fitness plan (Figure 1.2). The voice of each customer must be heard throughout the company. Everyone must understand the customer's needs and expectations, so that every decision is made with an eye on the impact it may have on the customer.

Customers come in all shapes and sizes, from a kid buying a hamburger to the person in the cubicle next to you. Your team may have several customers. Your customer may be either external (the ultimate consumer of the product or service) or internal (the person or persons to whom you hand off your work).

Often the primary customer is treated with great care and concern while the internal customers are overlooked or treated rudely. Both customers are important to the enterprise.