

TEAM LEADER'S


SURVIVAL GUIDE



JEANNE M. WILSON AND JILL A. GEORGE, Ph.D.

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Introduction

Today many leaders of teams feel lost at sea—unceremoniously dumped overboard without a life preserver—as their organizations sail full speed ahead into self-directed teams.

The irony is that this usually is not due to any malicious intent by the organization. Unfortunately, top leaders of most organizations don't have any better ideas than you do about the changing role of the leaders in the transition to teams. While they may have a vision, they often don't know how to help you make that vision happen.

That's why this guide is designed as a self-coaching tool. It takes you through what you need to do week by week to plan, create, and sustain high-performance teams. It sets you up for success and helps you evaluate your progress.

This book is written directly to leaders of high-performance teams: self-directed teams, semi-permanent project teams, and empowered natural work teams. It doesn't matter whether you're leading a team of executives or a team of operators, whether you work in a service or a manufacturing organization—this guide is designed for you.

Mapping the Voyage

Most teams will go through three distinct phases in their development: Preteam, New Team, and Mature Team.



Preteam Phase

This phase begins when the organization first considers teams. It ends when teams are formally chartered and have held their first meeting. This first phase can last from 4 to 12 months. At the beginning of the Preteam Phase, leaders and employees hold their first discussions about empowered teams. By the end of this phase, everyone has a vision of what teams can accomplish, and you'll have a design for how teams will operate to turn that vision into a reality.

New Team Phase

The New Team Phase begins with the first team meeting and ends about 12 to 18 months later. In the beginning of this phase, you will spend a great deal of time getting your teams started by developing a team purpose (or mission) statement, goals, and clear roles and responsibilities. Shortly after start-up, you will spend 40 to 60 percent of your time coaching team members to handle responsibilities that used to be part of your old job, such as scheduling vacations, assigning daily tasks, and monitoring results. By the end of this phase, you will assume a few new tasks yourself, ranging from increasing involvement with larger business issues to more strategic technical projects.

Mature Team Phase

If your teams have been operating continuously for 12 months or more and are handling most of their new responsibilities successfully, you probably are in the Mature Team Phase. Certain key skills and behaviors distinguish mature teams from new teams: handling new responsibilities competently, solving interpersonal problems, working together willingly, and maintaining predictable levels of high performance. If these skills and behaviors are absent, your teams have not graduated to the Mature Team Phase.



Getting Your Bearings

This survey is designed to help you establish where you are in your team implementation. Are you in the Preteam Phase? The New Team Phase? Somewhere in the Mature Team Phase? To find out, complete the survey by checking the boxes for those statements that apply to your situation.

Preteam Phase

You are in the Preteam Phase if you're:

- ☐ Becoming aware of the need to change.
- ☐ Completing a readiness assessment to determine your organization's cultural strengths and developmental areas.
- ☐ Defining organizational values to drive behaviors toward a more empowered culture.
- ☐ Still not sure that teams will work.
- ☐ Responding to skeptics who are wary of the team concept.
- ☐ Unsure about what your new role will be.
- ☐ Reconfiguring roles and responsibilities at all levels so people have more decision-making ability.
- ☐ Redesigning departmental boundaries so teams can control errors or variances within their own boundaries.
- ☐ Focusing on your personal needs and role.

If six or more of these statements apply to you, you're probably in the Preteam Phase. Pages 1 through 77 will be particularly helpful as you form teams. However, if you think you are beyond the Preteam Phase, you still might want to skim the activities to see if there is anything you and the team should do to become even stronger.

New Team Phase

You are in the New Team Phase if you're:

- ☐ Helping team members work together within new organizational boundaries.
- ☐ Transferring responsibilities to team members according to an Empowerment Schedule.
- ☐ Developing team goals in alignment with your organization's vision and values.
- ☐ Struggling not to revert to the comfort of your old role, especially during crises or when faced with technically complex problems.
- ☐ Spending 40 to 60 percent of your time coaching and developing team members.
- ☐ Seeing attitudes and behaviors becoming aligned with the team concept.
- ☐ Looking for more information to share with your teams about customer complaints, profitability, and related business matters.
- ☐ Focusing more on your teams' needs and roles than on your own needs and role.

As a rule, you're in the New Team Phase if six or more of these items apply to you. Pages 79 through 231 will help you move successfully into the next phase: Mature Teams.

Mature Team Phase

If your teams have been operating continuously for 12 to 18 months and are handling most of their new responsibilities successfully, you're probably in the Mature Team Phase. You are in the Mature Team Phase if you're:

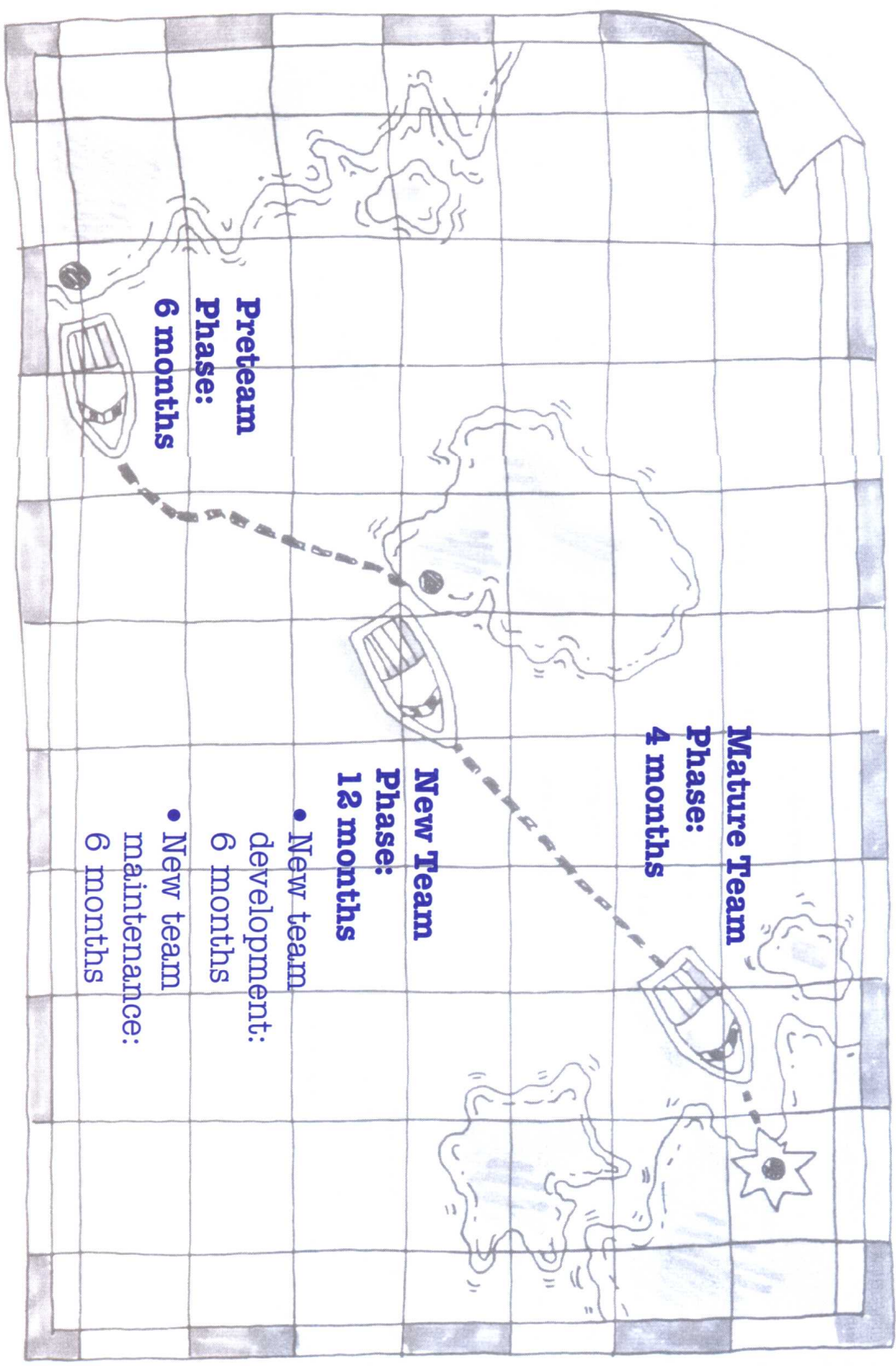
- ☐ Spending up to 80 percent of your time on strategic customer or product and service improvements.
- ☐ Working with teams that handle their new responsibilities successfully.
- ☐ Coaching teams to assume more advanced responsibilities, such as budgeting, peer review, and salary increases.
- ☐ Watching your teams produce at peak levels.
- ☐ Maintaining quality levels at an all-time high.
- ☐ Noticing that doubts about the team concept have practically disappeared.
- ☐ Stretching to take on roles outside your department or facility.

You've made it to the Mature Team Phase if at least five of these items apply to you. Pages 233 through 283 will help you maintain your high-performance teams.



The Journey

This book is designed to be a user-friendly, month-by-month planning guide to help you successfully navigate through each of the three team implementation phases.



How the Guide is Organized

The phases are presented in monthly segments, with each month containing the following components:



The first two pages for each month set the stage for what you can expect to discover in the month ahead. These pages feature two main sections:

What to Expect: This section highlights certain aspects of the changing situation that will affect what you do and how you do it. For instance:

- Team members' current information, coaching, development, and empowerment needs.
- Team members' expectations.
- Changes in your role as you move from supervisor to leader and coach.
- New tasks and responsibilities you need to prepare for.

Possible Concerns: As your role changes, each month brings new questions, challenges, and uncertainties. This section highlights a few common examples and provides some reassuring advice on how to proceed.



Each month is divided into four planning/action weeks. Each week includes a variety of tools that will help you:

- Answer burning questions.
- Establish new relationships, processes, and communication channels with people inside your organization.
- Coordinate resources for team members.
- Plan activities.
- Chart progress.



At the end of each monthly segment, you're provided with:

When to Call for Help: Each month presents new challenges, some of which you can't resolve on your own. This section lists those situations and suggests whom to go to for advice or guidance: your manager, peers, other team leaders, other units or departments, or team members themselves.

If You Do Nothing Else . . . : Progress requires commitment and work. So, if you do nothing else each month, make sure you complete or satisfy the items in this list. Letting these imperatives slip by could leave your teams floating in circles in a sea of confusion.



Each monthly segment concludes with:

- A calendar to plan activities.
- Spaces to record monthly outcomes:
 - Key lessons learned: What worked and what didn't work.
 - Your personal time budget (comparing actual times to suggested times spent on activities, and calculating the differences.)

How to Use This Guide



On Your Own

After you pinpoint where you and your teams are in the team continuum (Preteam, New Team, or Mature Team), you might want to skim the entire guide. This will give you an idea of what to expect and will help you recognize when you or your teams are grappling with an issue that is addressed elsewhere in the guide.

Many leaders find it helpful to set aside a specific time each week (such as 9:30 a.m. Monday) to work through that week's prescribed issues, exercises, and activities. In most cases this review will take about half an hour.

In a Group

Some organizations used an early version of this guide as the weekly agenda for supervisory self-help groups. Each week, one leader would take responsibility for facilitating a discussion of the issue outlined for that week, helping the group apply it to their own specific situations. You too can follow this format or adopt some other method that best addresses your situation.

Hint

Although the guide is laid out in a sequential format, we recognize that teams do not develop in a lock-step manner. For this reason, we suggest that you use the guide as a menu from which to select activities that are appropriate for you and your teams' development diet.



Team Leader's Survival Guide

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Preteam Phase

Welcome to the Preteam Phase! The following pages will help you become familiar with (and start addressing) some of the important issues you and your employees will face in the transition to teams. Here is a month-by-month, week-by-week look at the Preteam Phase:

Month 1

- What are empowered teams?
- Show me the results
- Getting up to speed
- Understanding the organization's vision

Month 4

- Preparing for your new role
- Time management for team leaders
- How to assess progress
- Building your employees' skills

Month 2

- Checkpoint #1: Synchronizing your vision
- Conducting a "stay-tuned" meeting
- Preparing the case for change
- Identifying what's in it for everyone

Month 5

- Increasing employee horsepower: Building skills—continued
- No guts, no glory: Sharing your leadership responsibility
- Increasing your own horsepower: Leadership skills
- Checkpoint #2: Finalizing your role with your manager

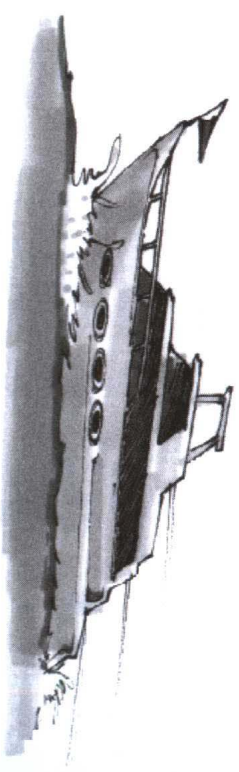
Month 3

- Communicating the case for change
- Redesigning for results
- Do-it-yourself redesign
- Changing your role's focus: From microscope to telescope

Month 6

- Dealing with performance problems
- Navigating with a skeptical crew
- Trust must come first
- Checkpoint #3: Reviewing progress

Preteam Month 1



Notes...

What to Expect

You and other people in the organization will spend a lot of time planning how work teams will be set up and how they will function. Occasionally you might feel as if this preparation is a waste of your time. Don't let feelings of frustration or impatience force you off course. Planning is important; stick with it. Failure to plan is one of the major reasons why team implementations fail (Wellins, Byham, and Wilson, 1990).

Agreeing on the Vision

Early in the Preteam Phase people might be confused and in disagreement about the definition of self-directed teams, how far the organization is going, or even why the organization would use teams as a vehicle for organizational improvement. This lack of vision is common in team implementation efforts. Don't worry too much about disagreements and misunderstandings. They are natural at this time. Discussing them and asking questions will lead to a common

understanding. Once there is general agreement and understanding of where the organization is going with teams, progress becomes easier.

Importance of Limits

Moving to empowered teams does not mean that you, the organization, or its employees can stock the fleet with every kind of ocean-going luxury or want-to-have. The sky is not the limit. Rather, the move to empowered teams should be a carefully planned, rational transformation. It should create—within clearly defined and understood limits—a better equipped, more responsive, and productive workforce. Knowing the plans and boundaries for the implementation of teams will go a long way toward clarifying everyone's responsibilities and expectations.

Month 1



Possible Concerns

I've heard a lot of talk around here about teams lately, and I have major doubts about whether teams would really work here.

You're not alone in wondering if work teams can be successful in your organization, with your union, or with your managers. However, you should be reassured to learn that work teams have proven successful in all types of settings—sales organizations, start-ups, retrofits, unionized organizations, government agencies, chemical processing plants, hospitals, distribution centers, and more. The kind of industry, business, or operation is less important than working together to lay a solid foundation on which effective teams can be built.

What exactly will my role be?

At the start of the Preteam Phase, it's difficult to specify exactly how each leader's role will change. At this point team structure and responsibilities have not taken shape. And while the leader's role is a key component to the team design, that design usually isn't completed until four to five months into the Preteam Phase. In time you will be doing less firefighting and more consulting, people development, or special projects. In fact, most leaders find that their roles eventually take a major turn: Where once they spent half their time on paperwork, after team implementation leaders find that they spend that time coaching or working on special projects. A key to re-creating your role to ensure future success is to get involved early on in redefining how that role will change.

Your Focus This Month

- This month you will need to work on the following areas as you prepare to launch into teams:
- Learning what empowered teams are and what they do.
- Understanding how self-directed teams are different from other kinds of teams.
- Identifying sources of information about empowered teams.
- Understanding your organization's vision and what it means to your area in the future.

Week 1

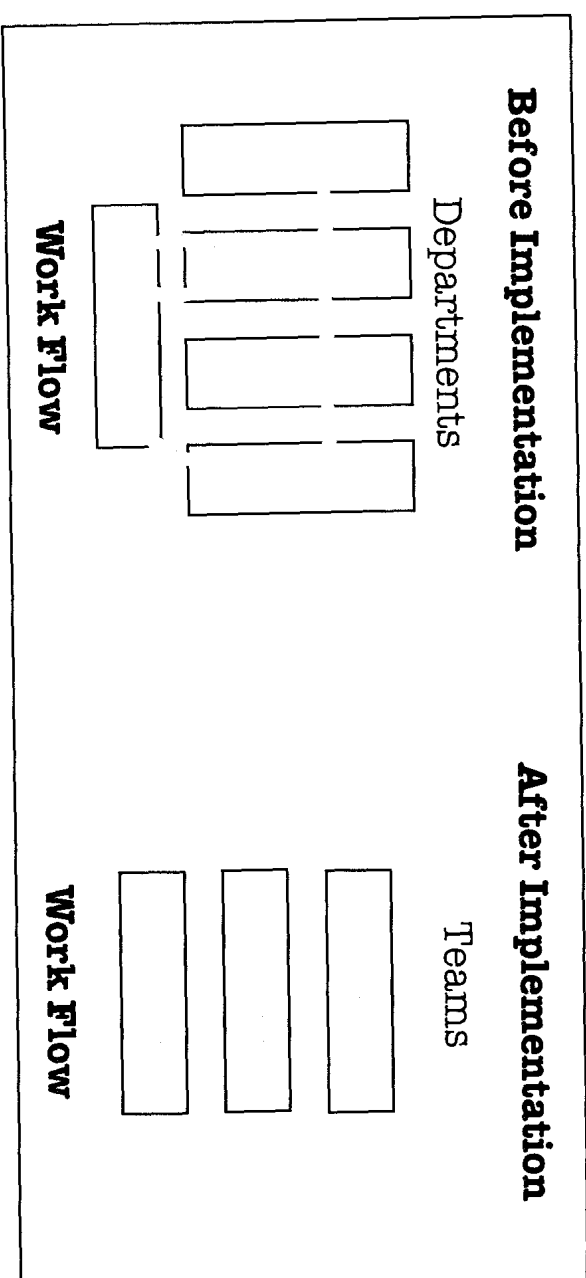
What are empowered teams?

History

Empowered teams (such as self-directed teams) are not new. Permanent work groups that control their day-to-day production, quality, and administrative duties have been getting results since at least the early 1940s. Work teams were first established in British coal mines. However, it wasn't until the 1970s that work teams started to catch on in North America. Currently, more than 30 percent of the organizations in the United States have self-directed teams in some part of their operations.

The Basics

Empowered teams are formed because they produce both technical results (increased productivity, better quality, and reduced cycle time) and social improvements (ownership of the work, increased responsibility, and collaboration between work areas). The secret to getting these results lies in the design of the teams' work flow and responsibilities. The most effective teams control their work from start to finish, as the illustration shows.



Empowered teams typically solve the problems listed below. Check those that apply to you.

Delays

- ☐ Machine downtime
- ☐ Waiting on lab results
- ☐ Delays for maintenance
- ☐ Waiting for data or reports
- ☐ Equipment installation
- ☐ Layers of approval
- ☐ Late shipments
- ☐ Delays in changing equipment
- ☐ Delays in solving customers' problems
- ☐ Long cycle times
- ☐ Extended patient stay

Errors

- ☐ Reworking errors in reports
- ☐ Inaccurate customer orders
- ☐ Errors handed from department to department
- ☐ Defective supplies
- ☐ Product does not adhere to customers' specifications (scrap)

People Problems

- ☐ Spending time on conflicts between departments
 - ☐ Lack of motivation
 - ☐ Blaming others
 - ☐ No variety in jobs
 - ☐ Underutilized skills
 - ☐ Lack of understanding of overall business
- With guidance and coaching from you, your teams can find ways to eliminate these delays, avoid these errors, and solve these people problems.