team *effectivness*
SURVEY

Facilitator Manual

USING FEEDBACK TECHNIQUES WITH TEAMS

Teams can benefit from feedback in the same way individuals can. The Team's process skills will be affected by an improved awareness of the elements that lead to good Team performance, i.e. the Team inputs. At the end of the process the Team should have an agenda for change and a list of issues to resolve with the Team. The Team Members should have a greater awareness of what is expected from them, plus a list of personal and Team development efforts.

These benefits become especially important and powerful where a service is being offered to customers as they may have little opportunity to inform Team development efforts. By asking important stakeholders to comment on the Team's output in terms of performance on specific customer service criteria, the Team is able to measure the bottom line in terms of customer satisfaction.

The customer-supplier relationship is greatly enhanced by the increased level and quality of communication. Through re-evaluation the Team can continue to gain feedback and keep on top of any problems that occur either internally or externally and resolve them before major or lasting damage is done.

INTRODUCTION TO TEAM EFFECTIVENESS SURVEY

The Team Effectiveness Survey is an instrument for assessing Team Performance as a whole unit. It measures a Team's overall effectiveness in 10 generic competencies, all within the areas of effective Team working and customer orientation. Feedback is provided by the Team's Members and customers.

Two questionnaires are used. The first measures Team Process Skills, the 'within-team' dynamics. This questionnaire is completed by Team Members only. The second measures customer orientation: how the Team serves its (internal or external) customers. This is completed by customers as well.

All ratings are given based on Team performance as a whole - not individual performance. Once all the data has been collected it is entered into the system. From here the results can be viewed on screen immediately. When printed, the profile comes with an explanatory introduction and an action planning section. These reports are normally supported with a group session by a trained facilitator. Competencies measured by the Team Effectiveness Survey:

Purpose and Commitment
Working as a group
Contribution to the Team
Interaction
Focus
Communication
Knowledge
Problem Solving
Customer Service
Concern for quality

APPLICATIONS

The Team Effectiveness Survey should be used at intervals of 6 - 12 months to help a Team to focus on the issues that are affecting it and to establish a plan of action to deal with the issues, improve development areas and identify opportunities for positive change. When used in tandem with TeamView360 the issues can then be related to building individual Team Members' action plans. In addition, the time series feature allows the Team to view previous scores against current ones on the same graph. This feature is provided to support trainers and facilitators who wish to use the Team Effectiveness Survey to make pre and post development measurements and view changes.

WHY DID WE CREATE TEAM EFFECTIVENESS SURVEY AND HOW DID WE DECIDE ON THE SKILL AREAS?

The usual preparatory process for a team event was a series of interviews with the stakeholders in team performance, in order to understand the context of the team and to form a 'diagnosis' of the team's ills. This process, which is still normal practice for those who are not aware of the power of feedback, is extremely time consuming both for Team Members and HR/Consultants.

We developed a list of potential team issues on the basis of extensive experience, which formed the basis of a paper and pencil exercise as part of the diagnostic interviews. This yielded such good results that it warranted further development. The customer orientation element was added, the feedback method was applied and the list developed into a survey of all the stakeholders.

Revisions took place in five stages, on the basis of feedback routinely requested from customers (facilitators and participants) and qualitative validation work carried out with respondents, on the items, content, coverage and utility of the Team Effectiveness Survey process. The current version has again been field tested and has proved extremely powerful in revealing team issues in such a way that the Team can immediately start work on them.

N.B.
The Team Effectiveness Survey is designed to be used with teams of people that work together on projects, rather than teams that only exist on an organisational chart. It is not expected that interesting information will be yielded by the process for teams that exist on organograms but do not act as a group in reality.

DEFINITION OF THE SKILL AREAS

Team Process Skills

Purpose and commitment
The extent to which the team members understand the team's mission and role within the organisation. The extent to which the team has a recognised place and identity within the organisation

Working as a Group
The degree of efficiency which the team displays when it operates as a group

Contribution to the Team
The extent to which team members contribute ideas, experience, and leadership to the team

Interaction
The degree to which team members work with each other by displaying team working skills

Focus
The degree to which the team plays a useful and improving role within the organisation

Customer Orientation

Communication
The effectiveness with which the team members listen to and interact with customers

Specialist/Product Knowledge
The knowledge which team members display in their own subjects and the awareness they show of their customers' business

Problem Solving
The manner and effectiveness with which the team members listen to, identify, and resolve customer concerns

Customer Service
The level of understanding shown by the team of its customer needs and its success in satisfying them

Concern for Quality
The degree to which individuals and the team as a whole are committed to high standards of achievement

THE QUESTIONNAIRES

The Team Effectiveness Questionnaire has two questionnaires, relating to the two areas it measures:

- inputs or Team Process Skills, and
- outputs or customer orientation.

The Team Process Skills questionnaire is designed for the Team Leader and Team Members, while the customer orientation questionnaire is designed for customers to answer too.

The Team Process Skills questionnaire asks respondents to rate their level of agreement with each behaviour statement about the team on a five point scale, Strongly Disagree - Strongly Agree.

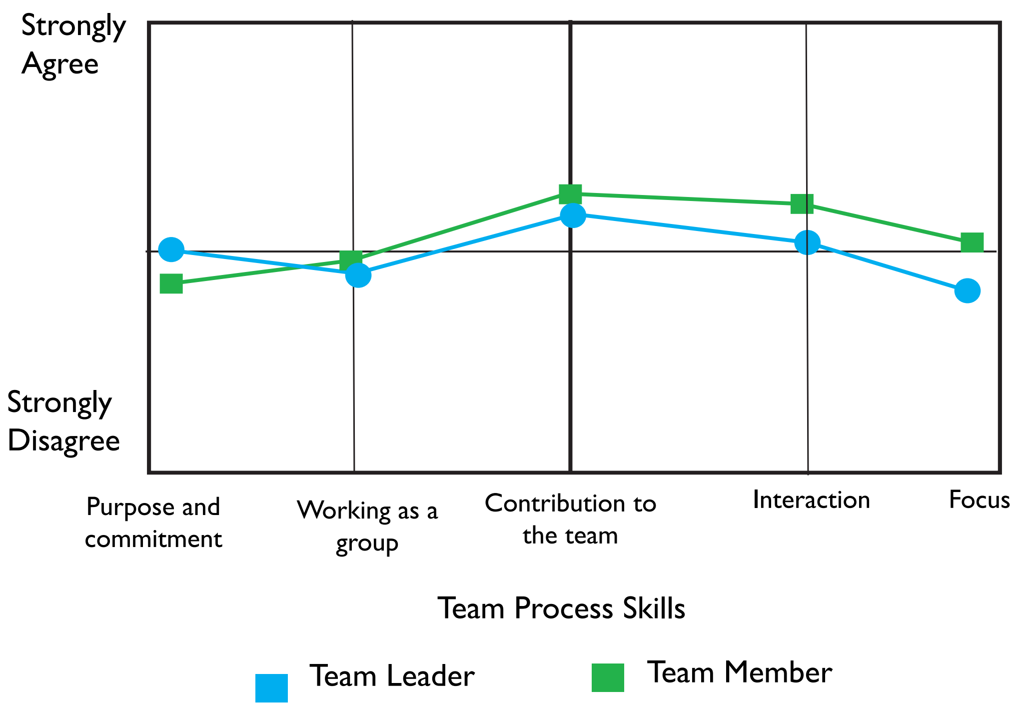
The customer orientation questionnaire asks respondents to rate the frequency with which they see each of the behaviour statements about the team, on a five point scale, Never - Always.

THE PROFILES AND THEIR INTERPRETATION

The following profiles can be generated using the system:

- Team Process Skills
- Customer Orientation
- Time Series Team Process Skills
- Time Series Customer Orientation

Each type of profile allows you to view and print graphs. For each profile the basic rules for interpretation are the same. The horizontal axis shows the skill areas or questions, the vertical axis shows the scale on which the questions were answered.



TIP: Lines on the graphs represent the average ratings given to the team by that respondent group. (NB: Not the rating given to that respondent group).

Team Processes

One graph showing the 5 skill areas overall, and one graph for each of the skill areas showing scores for individual questions. On each graph there is a line showing how the Team Leader rated the team and a line showing how the Team Members rated the team.

Customer Orientation

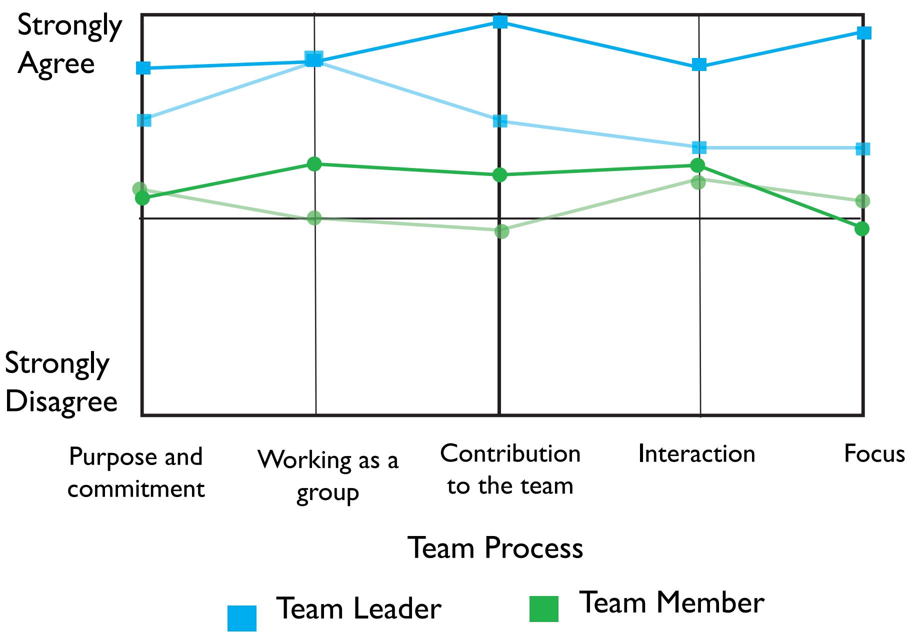
One graph showing the 5 skill areas overall, and one graph for each of the skill areas showing scores for individual questions. On each graph there is a line showing how the Team Leader rated the team, how the Team Members rated it and how the customers rated it.

Time Series - Team Processes

One graph showing the 5 skill areas overall, and one graph for each of the skill areas showing scores for individual questions. On each graph there is a solid line showing how the Team Leader rated the team this time (in the file that is open) and a dotted line showing how the Team Leader rated the team last time (in the imported file). There is also a solid and a dotted line to show changes in the way the Team Members have rated the Team this time (in the file that is open) against last time (in the imported file).

Time Series - Customer Orientation

One graph showing the 5 skill areas overall, and one graph for each of the skill areas showing scores for individual questions. On each graph there is a solid line showing how the Team Leader rated the team this time (in the file that is open) and a dotted line showing how the Team Leader rated the team last time (in the imported file). There are also solid and a dotted lines to show changes in the way the Team Members and customers have rated the Team this time (in the file that is open) against last time (in the imported file).



INTERPRETING REPORTS

Team Effectiveness Survey presents results in a graphical format.

What To Look For On The Graphs?

- High ratings given to the team, indicating perceptions of strengths.
- Low ratings given to the team, indicating perceptions of weak areas.
- Gaps between the perceptions of one respondent group and another, indicating differences in what is seen by the groups, or differences in the expectations of the groups.

So What Can We Learn From Our Results?

The following are some broad guidelines for interpreting the team and organisation's results.

- Look for patterns in strengths and weaknesses - does this highlight some strength to be built on or a problem with our procedures and processes?
- If the Team Leader's line on the graph shows a similar shape to the Team Members' then the Team as a whole is self-aware.
- If a Team Leader rates the Team differently from the Team Members and Customers it may point to a communication problem - the Team Leader may not be providing sufficient feedback to the group on current performance or effectively communicating expectations of future performance. It may equally suggest that the Team Leader is distant from the Team and does not have a clear picture.

RE-TESTING TO MEASURE CHANGE

The additional power of the Team Effectiveness Survey resides in the process of re-testing.

Analysis of initial testing should allow the Human Resources Department and the Management Team to develop:

- Targeted training solutions based on organisational needs
- Systems and procedures that are compatible with improving team performance
- Organisational strategies that build on strengths and overcome weaknesses

After any one or more of these solutions have been implemented and enough time has elapsed for their effect to be felt at the workplace, re-testing can begin.

'Time Series' profiles can then be generated by the system that allow for analysis of improvements (or otherwise) in performance from Test 1 to Test 2.

This analysis should lead to a refining of training and/or development needs to build further on strengths and overcome areas of weakness.

Re-testing can be repeated at regular intervals to keep track of performance or to test for the effect of any organisational or team development intervention implemented.

THE PROCESS

Successful implementation and use of the Team Effectiveness Survey depends heavily on careful briefing and de-briefing. The process outlined below represents best practice in this particular area.

- Select the Team
    - » This aspect is dealt with in more detail in the next section: Applications
- Briefing Team Leader
    - » The Team Leader needs to understand the purpose of the project, the details of the process, and how to brief Team Members and Customers.
    - » Brief the Team on what is to happen and why.
- Distribute the questionnaires
- Don't forget that the Team Leader and Team Members have both questionnaires whereas the Customers only have the Customer Orientation one. These will be distributed by email.
- Once the data is received, print reports using the online system.
- Discuss the graphs in advance with the Team Leader.
- Run a session for the team. Explain the makeup of the graphs. Show and discuss all graphs. Get the team to address questions where all the scores are low or high, and where there are discrepancies between what the three types of respondents think. Encourage the team to produce an action plan.
- Advise the Team Leader to thank the customers for responding and tell them the outcome of the team session.
- Plan a re-evaluation with a date. This sends a message to all concerned that you are serious about the changes planned.

ACTION MAP - WHAT DO I DO? WHEN DO I DO IT?

Activity	Details	Timing (Example)
Briefing Session	Explaining the concept of Team Effectiveness Survey to participants. Identify the objectives of the process within the context of the team. Establish the process and administrative details. Send out questionnaires.	7 March Week 1
Returns	Questionnaires are completed but the respondents and returned to be collated.	By 25 March End Week 3
Structure	Set up the structure to contain your data with a code that identifies it for easy access later.	
Team Details	Include demographic details about the team you are profiling.	
Data Entry	Enter the responses to each of the questionnaires for the team you are profiling.	
Production of Reports	Publish graphs for team processes and customer orientation for the team, either on screen or to a printer.	By 2 April End Week 4
Feedback Session	Explanation of results, issue identification, and discussion.	9 April Week 5
Concluding Session	Reflections on previous session, group activities, action planning, and how to make it happen.	22 April Week 6
Re-evaluate	To investigate changes made and establish areas for further improvements and to evaluate interventions made.	6-12 Months

ADDITIONAL DETAILS

Successful implementation and use of Team Effectiveness Survey depends heavily on careful preparation and proper communication. Consider carefully your actions as Facilitator and ensure that you set an example for the Team to follow. Here are some 'finer points' to consider:

Communication And Administration

Brief the Team Leader before you brief the team on the following points:

- Purpose of the project
- Details of the process
- Your role in the process
- Their role in the process

Brief the Team. The session or email should be what it says it is - BRIEF. The session would generally run as follows:

- Ice breaker
- Purpose of the project
- Details of process
- Choosing and briefing customers

Processing

This is dealt with later in the manual.

Communication And Conversion Into Action

We recommend 3 stages:

- Feedback
- Core
- Evaluation

It is important that before each stage the Team Leader is properly briefed on what is intended and the role you wish them to play in the process. Some points to consider are:

- Does the feedback have issues mainly internal to the team or mainly issues with customers? This will influence your choice of tasks and tools that you use

- Team Effectiveness Survey is just one Team Development tool: do not forget the other tools in your kit when working with Teams, in terms of:

  » Ice Breakers
  » Tasks / exercises
  » Psychometric tools to help the Team understand the 'cause' behind particular 'effects' seen in the Team Effectiveness Survey feedback
  » Games, etc

- Encourage the Team to produce an action plan that is specific and actionable. Participation is important in this aspect.

APPLICATIONS

The Team Effectiveness Survey is essentially a team-building and quality improvement tool. Below are the pre-requisites for applying it.

Team Members must know each other well enough to answer the questions. This may sound obvious, but sometimes it is not. For example, you would not use it on 'organogram' teams or disparate functions which only exist together on an organisational chart

Customers must also know the team, or at least work closely with one or more individual members. Customers may answer the questions based on their knowledge of individual Team Members, or of the Team as a whole

This is not a tool that can be used on a Team that has just been set up. Time, perhaps a few months, needs to have elapsed to enable Team Members to get to know each other, and for Customers to form a view on the service they are receiving. In terms of Adair's Group Development model, Team Effectiveness Survey could not be considered at the forming or storming stages, but is an excellent way to move a Team from norming to performing, and to maintain it there through 'keeping an eye on the pulse'

Team size should be from four members upwards. Any number over four can be accommodated provided that the Team is really a unit and not a series of sub-teams. Sub-teams should have their own special Team Effectiveness Survey feedback.

Team Effectiveness Survey can be run on 'problem' teams, or on those which require accurate feedback in order to help them develop.

Team Effectiveness Survey is ideal for taking a 'before' and 'after' measurement. In this way, the Team can see how they have improved. The 'after' measure should be taken 6-12 months after the first feedback.

USING TEAM EFFECTIVENESS SURVEY WITH TEAMVIEW360°

TeamView360 is an instrument for assessing individual performance within a Team. It measures an individual's overall effectiveness in 7 generic competencies all within the area of effective team working. Feedback is provided by the participant (self) and other Team Members.

Each Team Member rates him/ herself and then rates each other using the online questionnaire. Once all the data for a Team is in the system, profiles for each Team Member can be viewed on-screen immediately. When printed, the profiles together with an explanatory introduction and an action planning section make up a substantial feedback report for each individual. A Team feedback report can also be printed. These reports are normally supported with both group and one-to-one sessions with a trained facilitator.

Competencies measured by TeamView360° are:

- Planning
- Problem-Solving
- Controlling
- Self-management
- Managing Relationships
- Leading and
- Communicating

When an individual's results graph is being produced, a database of around 8,000 individuals is used, allowing the graph to be plotted against the average for a similar amount of people.

When used in tandem with Team Effectiveness Survey, the issues can then be related to team issues and building an action plan for the team as a whole.

A personal effectiveness plan helps Participants to set meaningful goals which show not only weaknesses, but strengths as well. These can be monitored in future surveys.

ADVANTAGES OF USING TEAM EFFECTIVENESS SURVEY AND TEAMVIEW360° IN TANDEM

- Clarifies the roles of Team Members
- Ensures the team are pulling in the same direction
- Alters people's attitudes to performance
- Improves the Team's relationships both internally and externally
- Puts responsibility for change on the individuals
- Allows the team to build on strengths, and value individual differences
- Helps to establish important concepts e.g. continuous improvement, internal customer etc.