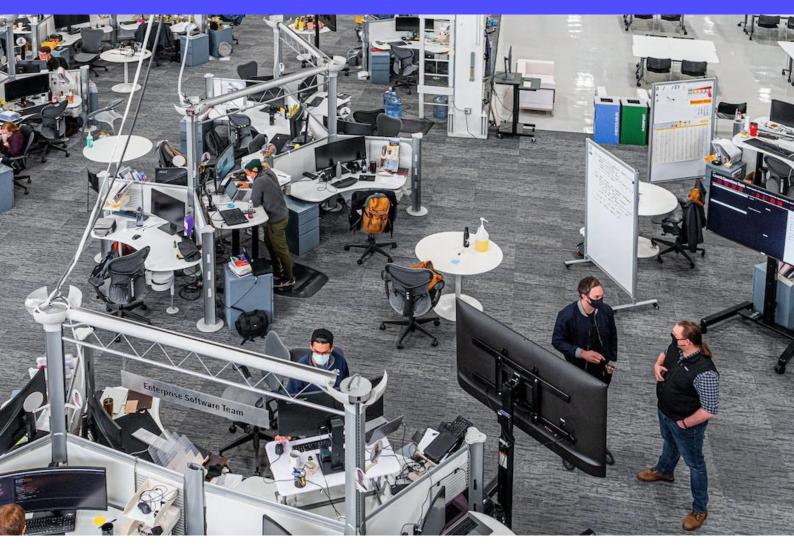
Leadership Team Health Check

A Continuous Improvement Roadmap for Teams

FULL TEAM REPORT



Project: Initial Evaluation

Team: A-Team

Business Unit: Case Study

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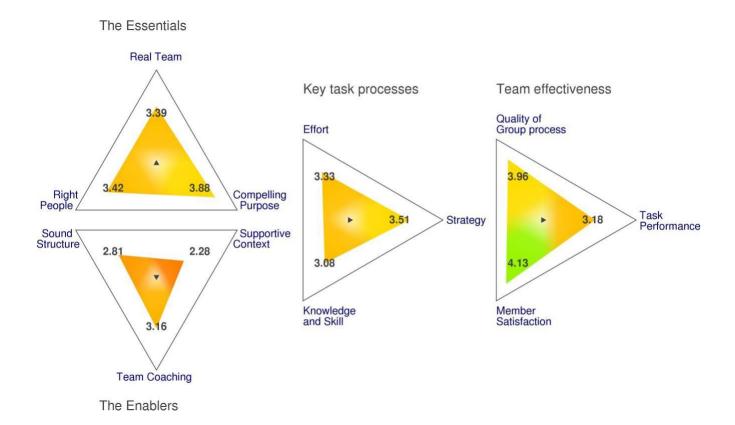
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Introduction

The Team Health Check is a validated instrument designed to diagnose the strengths and weaknesses of teams. Dr. Ruth Wageman, Dr. Richard Hackman, and Dr. Erin Lehman of Harvard University created and validated this assessment based on their research about the conditions that foster team effectiveness. The work of other thought-leaders such as Dr. Amy Edmondson has been integrated into the Team Health Check. The Assessment measures 6 dimensions (aka: conditions) that account for up to 80% of team effectiveness, 3 key task processes that emerge from those conditions, and 3 measures of high performing teams.

Overall Snapshot: A Visual Executive Summary.

The graphic below illustrates at-a-glance the relative strengths and weaknesses of the team. In the graphics, **green** shading that is close to the black "ideal" triangle indicate that the team is in good standing; **yellow** shading, more distant from the ideal, indicate some need for attention, and **orange and red** indicate that the team faces significant challenges on that dimension, these areas require immediate attention. The numbers in each triangle report the mean scores of the team on each factor (1=poor, 5=superb).



6 Conditions. The first part of the diagram, the Six Conditions, represent the main features of a team's design that you can influence to shape its effectiveness. The Six Conditions are presented in chronological order. To build a great team, first come the **Essentials** (Real Team, Right People, Compelling Purpose). When the Essentials are in good shape, turn next to the quality of the **Enablers** (Sound Structure, Supportive Organizational Context, Team Coaching). **Detailed definitions and breakdowns of these 6 are in the pages that follow.**

Definitions: Establishing a Common Language

3 Core Criteria of Team Effectiveness. A high performing team is one that (1) Meets or exceeds the needs of its clients, stakeholders, and end-users (TeamTask Performance); (2) Does so in ways that build the team's capability: how we collaborate to get work done. (Quality of Group Process) and (3) Contributes to the growth and learning of its members and the collective: member engagement and satisfaction.

3 Key Task Processes. Together, these Six Conditions collectively influence the <u>3 key task processes</u> that drive team effectiveness: **Effort**: how hard is the team working? **Strategy:** how effective are the team's ways of working? and **Knowledge and Skill**: how well is the team using its full capabilities? These 3 <u>Task Processes</u> are great predictors of how well a team will perform (execute) in the long run and how it will scale and develop over time.

Supplemental Material. In addition to these main dimensions, this report gauges and provides feedback on other aspects of team-functioning and leadership behavior that helps identify and interpret opportunities for intervention and coaching.

Interpreting Charts and Graphs In This Report

Throughout the TDS report, **Green** shading indicates that the team is in good standing on that dimension; **Yellow** shading indicates some need for attention, and **Orange and Red** indicate that the team faces significant challenges on that dimension. The shading is relative to the absolute standard (1=poor, 5=superb) on the measurement scales used, and not based on empirical norms.

Data presented in **Blue** are descriptive (like pages 19 and 24); there is no "better" or "worse" score on these dimensions.

The **height and depth of bars** in the bar charts indicate spread of responses, with **the average** of team member responses reported with **the dark line in the middle** of the bar.

Using The OVERALL SNAPSHOT (P.3), Consider It A Summary, Of Team Health.

Reflecting on this summary diagram, consider:

Where are the team's greatest strengths? In other words, where are the scores closest to ideal? Are those strengths among the Essentials?

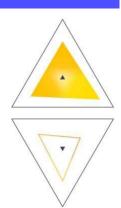
Which scores are of most concern? Where is the team farthest from ideal?

Tackle the Essentials first. Teams must have a solid basic design to take advantage of the Enablers.

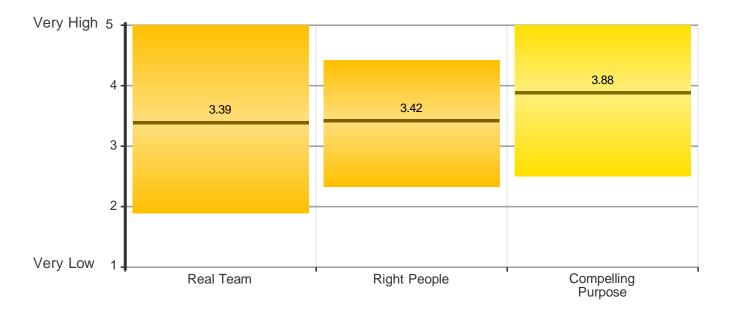
The Essentials

The Essentials: Summary

The Essentials are the three main conditions that result in a sturdy platform for any team to be able to perform effectively: **a Real Team**, working toward **a Compelling Purpose**, with **theRight People** involved in the team. If any of these conditions are missing or weak, teams will inevitably struggle over time.



The Essentials



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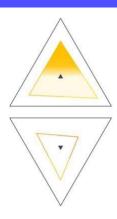
Which of the **Essentials**—Real Team, Right People, Compelling Purpose—is in most need of attention? The pages thatfollow will address each of these in more detail.

Reminder: The size of the bars indicates the spread of responses in the team. Larger bars mean there is less clarity, alignment and agreement in the team.

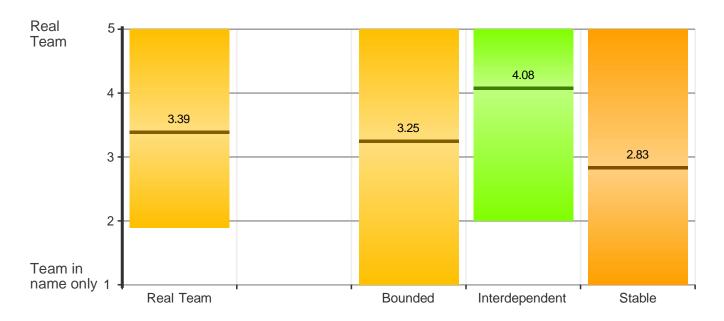
Is This A Real Team?

Is This A Real Team?

Real Team means that the team is **Bounded** (long-living), meaning that members know who is and is-not on the team. It is **Stable**, meaning that members stay together long enough to learn how to work together. The team container persists. It is **Interdependent** for a common purpose, meaning the team must interact and share resources to accomplish their purposes. Collaboration is necessary to deliver, it is not a group of independent contributors or siloed coordination.



Is this a real team?



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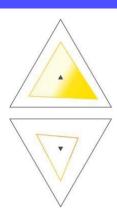
Teams score low on **Real Team** typically because:

- Their work is disaggregated into individual tasks performed independently of each other.
- They are a team in name only.
- · When the team convenes, they merely provide updates on their individual accomplishments.
- Membership changes frequently or the team is kept intact for too little time.
- Different people show up to each meeting or to support the work.

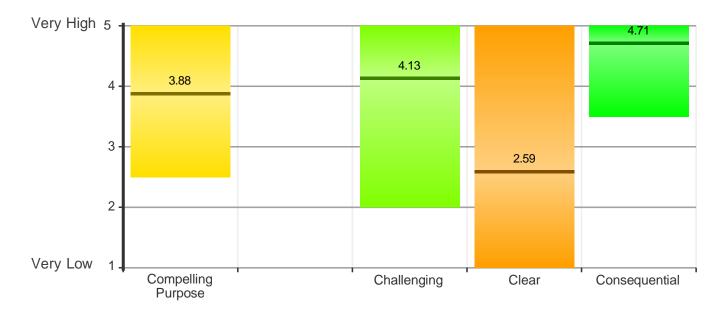
Does The Team Have A Compelling Purpose?

Does the team have a Compelling Purpose?

Compelling Purpose means that the purpose is **challenging** (a stretch, but not impossible), **clear** (they know what it would look like and feel like to accomplish it.) and **consequential** (it has meaningful impact on the lives and work of others). Compelling purpose orients and motivates team members so that they are headed in the same direction—even when they are not working in the same place at the same time—and they do so with <u>energy</u>, <u>ownership</u>, accountability and conviction.



Does the team have a compelling purpose?



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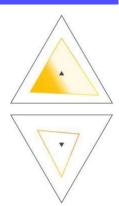
Teams with low scores on this **Essential** condition typically struggle with some or all of these threats to theireffectiveness:

- The team's purpose lacks importance in the overall scheme of things, not clear or does not resonate well with team members' values, or has been poorly connected to strategic aims of the larger organization.
- The purpose is relatively trivial or doesn't stretch members' capabilities.
- The impact of their work or what success looks like is vague or not valued within the system.

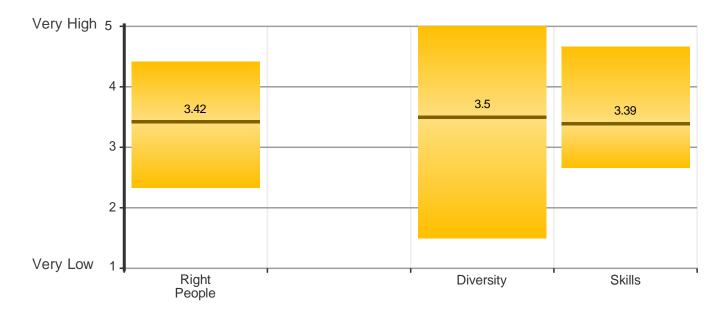
Does The team Have The Right People?

Does the team have the Right People?

Right People means that the team has both the right **Skills** to do the work effectively including *teamwork* skills; and **Diversity** that brings a range of perspectives needed to perform creatively and well.



Does the team have the Right People?



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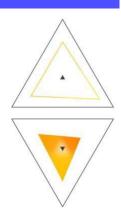
Teams that score low on **Right People** often do so because:

- Members have been placed on the team without enough strategic thought about what they can contribute to the purpose, and they may be there for other reasons (representing each part of the organization, for example). No one assessed the degree of teamwork skills that members have.
- Members may be "too different" so they struggle to understand each other's perspectives.
- Or they may be "a good Mix," meaning the right range of perspectives.
- The boldface text at the bottom interprets the "Diversity" bar above. Members may be "too alike"—so similar in background and experience that the range of perspectives is too narrow: **Diversity Insight:** (A good mix) Additionally:
 - The team may need to cross-train where possible.
 - IT may be that the team does not have access to the proper tools so it impacts scores.

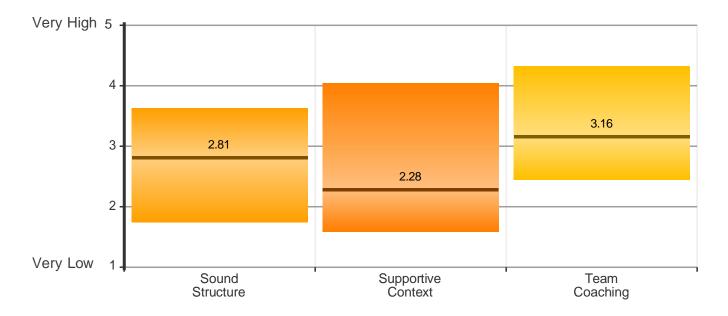
The Enablers

The Enablers

This chart represents the team's scores on the **Enablers**. The bar chart provides the team's scores on **Sound Structure**, which includes the team's size, tasks, and core norms of conduct. It shows whether the team works in a **Supportive Organizational Context**, meaning the organization's structures and systems enable rather than impede teamwork. The third **Enabler** is **Team Coaching**, meaning the availability of someone to help the team develop effective processes and approaches in how to work together. In addition, help facilitate tensions that get in the way of working effectively.



The Enablers



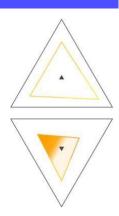
These three conditions accelerate how fast teams grow into truly excellent performers. In the pages that follow, we break down the Enablers into their elements.

Does The team Have A Sound Structure?

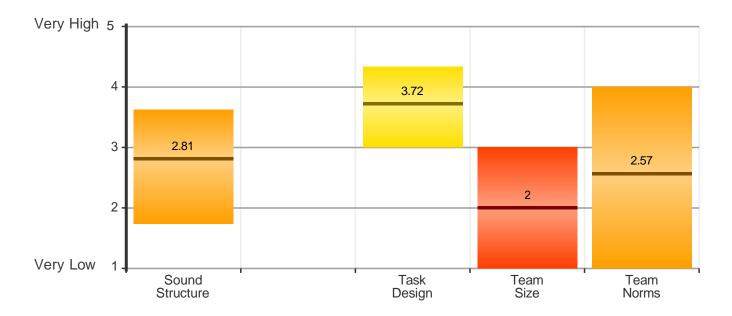
Does the team have a Sound Structure?

Sound Structure has three elements. **Task Design** means the team performs work that makes sense to be done by a team and that allows members to use their judgment and experience to complete it. (Does a good level of empowerment and autonomy exist?) **Team Size** means the team is neither too big to coordinate nor too small to have the resources they need to do and execute the work from start to finish.

Team Norms means the team has clear ground rules for how members are expected to work together. This includes working agreements, manifestos, and coaching alliances. Descision rights are clear and visibile.



Does the team have a Sound Structure?



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Teams with low scores on **Sound Structure** often suffer from:

- Too many people in the team, sometimes for political, role or org. structure
- rather than task reasons.

Expectations of members are not addressed or are not really enforced.

 The work makes no sense to be done by a team; members have disaggregated it into smaller pieces and there is no real opportunity for teamwork.

Here are the ranges in the reported team size by team members. When there are large discrepancies in the reported number of team members, the team has porous or unclear boundaries of who is part of the team:

Smallest Reported: 3

Average: 15.7

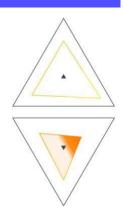
Largest Reported: 65 Size: Lack of alignment.

Does The Team Operate In A Supportive Context?

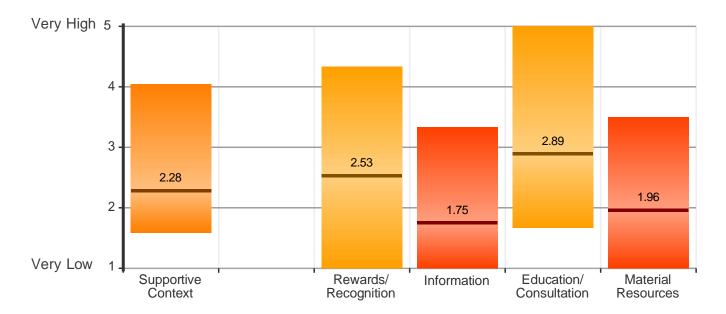
Does the team operate in a Supportive Context?

Supportive Context means the organization's structures and systems promote rather than prevent teamwork. Rewards and Recognition means the organization pays for and celebrates excellent team performance (not just individual contributions.)

Information means teams get thedata they need in a form they can use in a timely manner that allows for flow. Education/Consultation means that when teams encounter novel problems or need to improve their teamwork they can get training, technical SME consultation. Material Resources means that meeting space, tools, focus time—whatever the team needs to effectively work is made readily available.



Does the team operate in a Supportive Context?



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Teams with low scores on **Supportive Context** often suffer because:

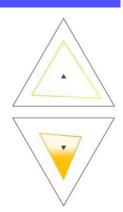
- The reward system is designed to reward individual excellence.
- The organization skimps on training or restricts access to expert resources.
- The information system produces data information that is out of sync with the team's needs.

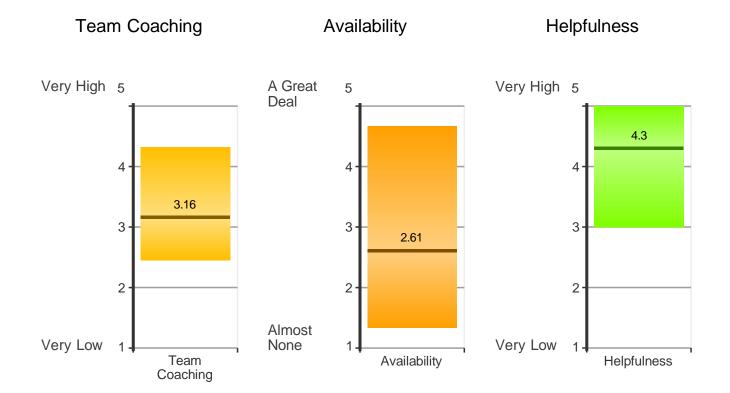
Is Team Coaching Available?

Is Team Coaching available?

Team Coaching means someone is available to the team—a leader, a member, an external consultant—who pays attention to the team's process, ways of collaborating, and intervenes at helpful moments.

Availability means often or readily present for the team. **Helpfulness** means the person doing the coaching knows how and when to intervene.





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Teams have low **Team Coaching scores** when:

- There is no individual who holds accountability for providing ongoing team
- · coaching.

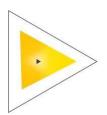
No one in the team feels able or allowed to intervene in team process.

- Team coaches are difficult to access (in high demand, costly to the team, little
- availability).
 - Coaching is focused on individual performance and not on the team as a whole.
- Coaching is viewed as a formal intervention in troubled teams, rather than an ongoing support for all teams.

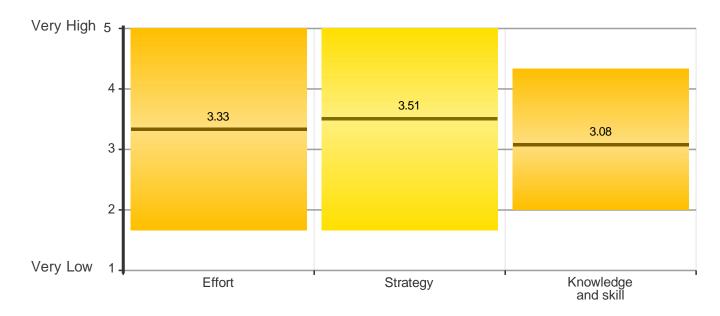
Key Task Processes

Key Task Processes

Key Task Processes mean the ways that members are working together that result in the team using its full capabilities to do the work well and the team over time grows its capability. **Effort** is working in ways that build shared commitment to the work and the team. **Strategy** means inventing uniquely suited approaches to the work. **Knowledge and skill** is using member capabilities well.



Key Task Processes



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Teams with low scores on the Key Task Processes:

- Some members may be withdrawing their effort over time rather than carrying too
- much. Lack of ownership and engagement.
 - Members have trouble coordinating with each other to carry out their work plans.
- Some team members are not able to contribute because their views are not considered in the team's work.

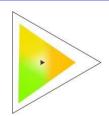
Poor scores in Key Task Processes are signs that something needs attention in the **Team Design**. Consider: Is thepurpose clear and compelling? Is it a Real Team, with the Right People? Look back at the team's scores on the Essentials and the Enablers, because these are the main drivers of the Task Processes dimensions.

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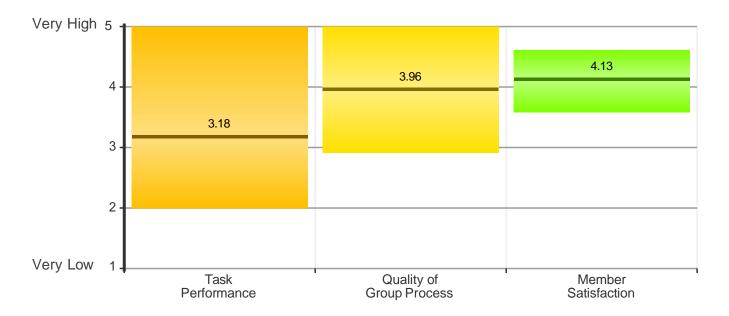
Three Criteria Of Team Effectiveness

Three Criteria of Team Effectiveness

The **Criteria of Team Effectiveness** mean that the team outcomes are excellent. **Task Performance** means the main clients/stakeholders or users of the team's work are satisfied with the quality, quantity, and timeliness of the team's work. **Quality of Group Process** means the group is becoming increasingly effective over time, not just for a spurt: one-time good performance. **Member Satisfaction** means that the team contributes to the learning, growth and satisfaction of its members. There are tradeoffs among these three outcomes in the short run(e.g., sometimes a team has to put task performance ahead of member learning), but great teams are able to make those tradeoffs and build positive outcomes on all three over time.



Team Effectiveness



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Teams with low scores on the criteria of Team Effectiveness:

- Have some clients of their work who are dissatisfied with what they get from the team.
- May be working in ways that get the job done but that undermine relationships and frustrate individuals along the way. (not sustainable cadence along with a sense of burnout)
- Overfocus on one outcome—such as making sure members are comfortable—at the expense of others (such as paying attention to what their clients need).

Poor outcomes are signs that something needs attention in the **Team Design**. Consider: Is the Purpose compelling? Is it a Real Team, with the Right People? Look back at the team's scores on the Essentials and the Enablers, because these are the main drivers of effectiveness--and the best points of intervention to improve outcomes over time.

Team Performance Metrics: Self-Evaluation

Team Performance Metrics Self-Report

This page summarizes the typical performance metrics this team's members believe are most important to their clients. This report can help members reflect on the challenges and tradeoffs among their responsibilities and provides additional detail about the 1st Criterion of Effectiveness. The performance metrics are broken down by areas where the team believes their performance is Superb, Good, Moderate, Somewhat poor, and Poor.

Superb:

Customer Satisfaction Ontime system delivery

Good:

Cross Departmental Involvement in Initiatives/Customer Satisfaction
Cross Departmental Involvement in Initiatives/Customer Satisfaction
Delivering acceptable system performance
Customer feedback
delivery (uptime and/or project)
Outages
Project Planning
System uptime
Avoidance of major incidents

Moderate:

Time to market Number of incidents Cust. Satisfaction Deadlines in project plans met

Somewhat poor:

Project lists Meeting deadlines completed artifacts

Poor:

What Is The Main Purpose of The Team? (Self-Report)

What is the main Purpose of the team? (Self-report)

This page lists how each member expresses in their own words the main purpose of the team. Are their views aligned?
Where do they differ or overlap?
Does the purpose seem compelling to everyone?
What might make it more compelling?

Our Purpose

Support, Maintain, and Develop applications and systems.

Application Architecture, Design and Automated Testing

Provide digital services to student faculty and staff to improve their experience.

Execute the operations and project initiatives of Enterprise Applications Department

Leadership Team for the Division (managers, team leads, technical leads and supervisors)

Deliver and support middleware and DB technologies and application systems for core business and supporting functions

Leadership and Management of Department

Provide application support for enterprise applications

SAP Landscape System Administration to support HR/Payroll, ESS and MSS Functions

Support enterprise applications

To lead Enterprise Applications Department

Lead Enterprise Applications Department

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How Well Is The Team's Purpose Specified?

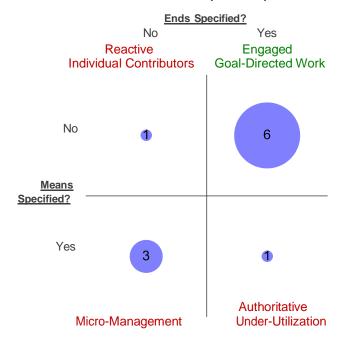
How well is the team's Purpose specified?

Teams benefit from a purpose that is crystal clear about "ends"—what the team exist to accomplish—and leaves plenty of room for the team to decide *the means* to reach those ends. What outcomes and success looks and feels like.

In the diagram below, each team member indicated whether the team purpose is well-defined (*Ends* Yes vs. No) and whether someone also has specified the means they should use to get there (*Means* Yes vs. No).

Ideally, members agree that someone specified the ends, but not the means.

How well is the team's Purpose specified?



Engaged, Goal-Directed Work - The upper right quadrant, is best. (Collaborative approach to work, engaged team members)

Reactive Individual Contributors (Chaotic – energy depleting environment) – when neither ends nor means are specified. Team members make independent decisions about what to do and how, creating fragmentation.

Under-Utilization – When both means and ends are specified, only one individual's knowledge (whoever specified the purpose) is truly being used. (Destructive productivity)

Micro-Management – When the purposes of the work, the end states, are unclear, but all the steps to get there are over-specified. This kind of Micro-Management, focused on the details of *what* the team does, and not *why*, is a serious problem for engagement, ownership and accountability. (Destructive productivity)

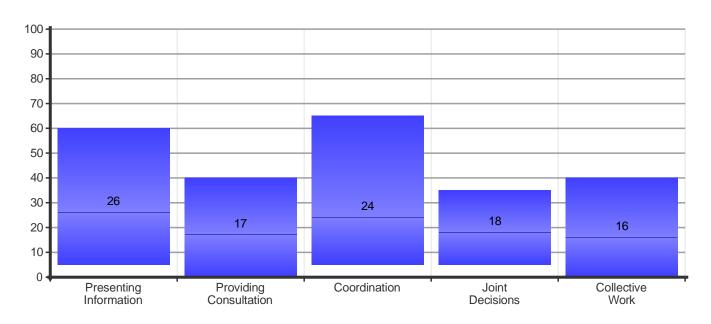
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Meeting – Focus Types

Meeting-Focus Types

Teams differ in the main kinds of work they do. This chart summarizes the way the team spends its time when convened, from least interdependent to most interdependent. **Presenting information** means members update each other on individual work and status. **Providing Consultation** means members provide advice to each other so that individuals might do their own work more effectively. **Coordination** means that the team integrates individual tasks. **Joint Decisions** means the teams makes decisions together. **Collective Work** means the team performs interdependent work. The graph below summarizes the average amount of time the team spends on each kind of work.

Teamwork When Meetings



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Note: Information about Meeting Focus Types is especially helpful for leadership or management teams. Many leadership teams are teams in name only, because they spend the bulk of their time exchanging information that may only be relevant to a few members, and very little time making the critical leadership decisions needed by those they lead. Delivery teams can be spending more effort and time in performing non-business value efforts.

Consider:

Most of the time what is the Meeting Focus Type for this team? What type of Focus Type should this team be?

How Much Authority Does The Team Have?

How Much Authority Does the Team Have?

Teams have different levels of authority over features that influence their performance. **Manager-Led** teams have authority only to execute the work; most or all other key decisions are made by Managers.

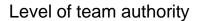
Self-Managing (Self Organizing) teams not only execute but have substantial-meaningful authority to decide their approach (How) and execution strategies, including the timing, sequencing, and allocation of capacity.

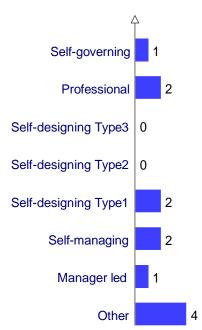
Self-Designing teams also have authority to alter structure, governance and composition of their own teams. Specifically, **Self-Designing Type 1** teams can invite new members or change their composition. **Self-Designing Type 2** can allocate rewards. **Self-Designing Type 3** can both change members and allocate rewards.

Professional teams can decide their purposes and manage their own work but have little control over membership.

Self-Governing Led teams form for their own purposes. They decide why they exist as a team at all and who will be part of that work

Other teams do not fit any of these typical forms.





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Do members generally agree on how much authority they have? What kind of authority do most members agree that they have? Are design rights clear and explicit within the team? What kind of authority should they have?

Consider whether the team itself (or someone outside the team) has the most knowledge and expertise to make decisions about these features of team design and functioning.

Team Learning & Psychological Safety

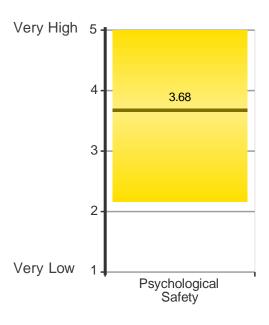
Team Learning & Psychological Safety

Teams that perform innovative work, deal with complex problems or that do knowledge work benefit from work processes within the team that promote risk-taking, learning, and experimentation. **Team Learning Orientation** means members encourage proactive learning and competence development for their members, expanding the team's capability. (Removing internal and external dependencies over time) **Psychological Safety** means the team reinforces a belief that interpersonal and professional risk-taking is welcomed and supported in the team.

Team Learning Orientation



Psychological Safety



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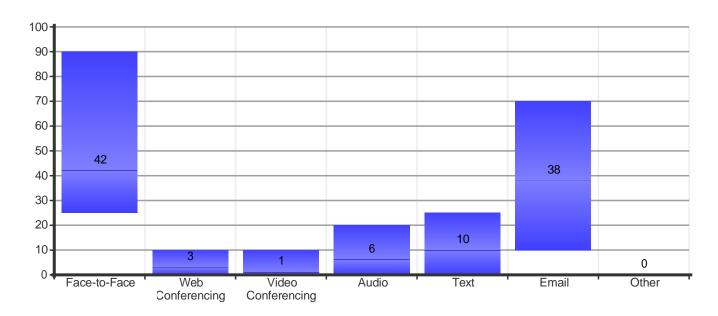
Teams that score low on team learning orientation or on psychological safety tend to be teams in which members or the organization's norms emphasize performance over learning, and create environments that does not encourage innovation, exploration or novel approaches. In addition, retribution is imminent.

Methods Of Communication To Get Work Done

Methods of Communication With Other Team Members

Teams use different media to coordinate and complete their work. The graph below summarizes what members say they use most and least frequently as a means of working together.

Communication With Other Team Members



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There is no ideal mix of communications media for all teams; many teams benefit from taking advantage of multiple forms to manage the work. Complex problem-solving and conceptual work benefit from some face-to-face interaction, especially early in the life of the group. Given the purposes and tasks of this team, what forms of communication are most helpful? Underutilized?

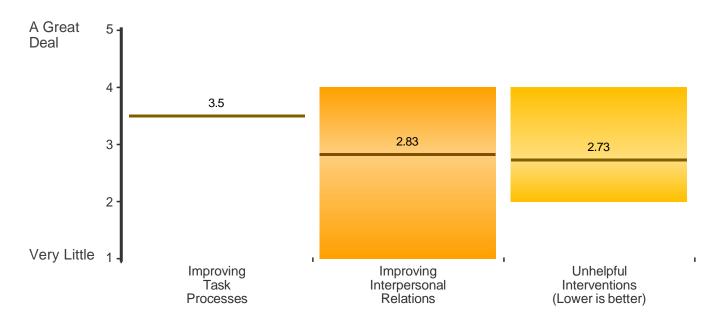
Team Self-Coaching

What Kind of Coaching Do the Team Members Themselves Do?

Members can provide helpful coaching to the team. This chart summarizes the amount of time team members spend on Task vs. Interpersonal vs. Unhelpful Coaching

Improving Task Processes is coaching focused on helping members make the best use of their knowledge, skill, and experience in doing the work. **Improving Interpersonal Relations** is dealing with conflicts and building positive feelings among team members. **Unhelpful Interventions** is telling the team its problems and how to solve them.

What Kind of Coaching Do Members Provide?



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- Task coaching should be high, it is helpful to team effectiveness.
- The amount of interpersonal coaching should be moderate or low. This kind of coaching is more often a distraction than a helpful intervention.
- Unhelpful Interventions should be very low. This kind of coaching undermines team self-management/self organizing.

Designated Team Leader

Does the Team Have a Designated Team Leader?

Number of members responding Yes vs. No

0 Responses No, leadership is shared among team members.

0 Responses There is no designated team leader but a particular individual acts as informal team leader.

12 Responses Yes, there is a designated leader of the team.

WHO is Identified As The Leader

NP PS NP

NP NP; we are missing the default back-up when he is not available (Assoc. Director)

NP

NP NP

MA

NP

NP

NP

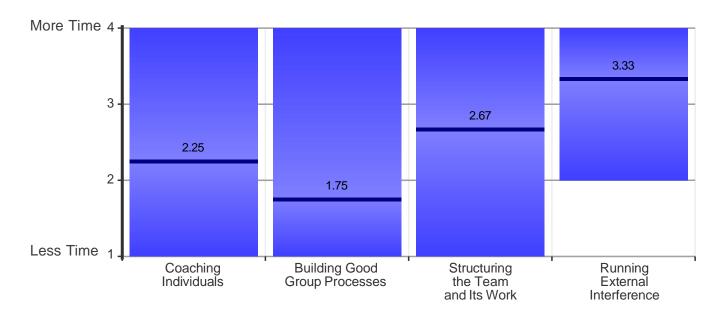
Focus Of Team Leader's Activities

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Team leaders can spend their time in four distinct kinds of leadership activities, all of which can be helpful to the team. This chart summarizes how the team experiences the relative amount of time the leader spends in these activities:

Coaching Individuals is providing feedback and intervention into the behavior and performance of individual team members. Building Good Group Processes is coaching the team as a whole to develop their effectiveness. Structuring the Team and Its Work is designing the team, choosing members, clarifying purpose. Running External Interference is making sure that the team has the resources, authority, and legitimacy it needs to accomplish its purposes.

Focus of Team Leader's Activities



USING THIS SUMMARY FOR DIAGNOSIS AND ACTION PLANNING

Of these four activities, 2, 3, and 4 should get relatively more of the leader's time. Coaching individuals should come last, because this activity is relatively more effective when the team is already well designed, well structured, and well coached.

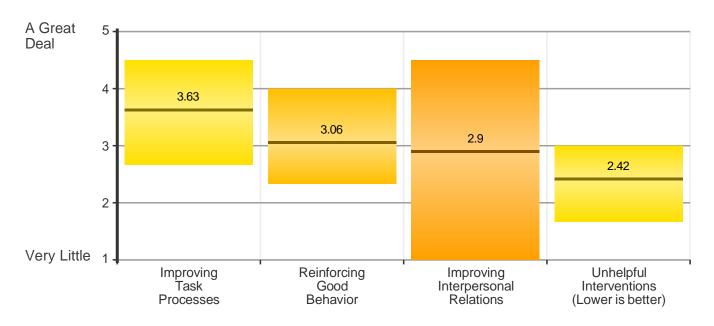
Which leadership activities are getting relatively more of the leader's attention? Which leadership activities need more attention?

Coaching Provided By Leader

What Kind of Coaching Does the Leader Provide the Team?

This chart focuses on the coaching behavior of the designated team leader. Coaching refers to direct intervention into the team's processes to improve the team's functioning and performance. There are four kinds (types) of coaching that are commonly seen in leaders' coaching. Not all are useful towards leading the team to self-organize and high performance. Improving Task Processes is coaching focused on helping members make the best use of their knowledge, skill, and experience in doing the work. Reinforcing Good Behavior is providing positive feedback for desired behavior. Improving Interpersonal Relations is dealing with conflicts and buildingpositive feelings among team members; and Unhelpful Interventions is telling the team its problems and how to solve them (both the what and how). The graph below summarizes how much of his or her time the team leader spends providing each of these kinds of coaching.

What kind of coaching does the leader provide?



USING THIS SUMMARY FOR DIAGNOSIS AND ACTION PLANNING

Improving Task Processes and Reinforcing Good Behavior should be high. Both forms of coaching are helpful to team effectiveness.

The amount of interpersonal coaching should be moderate or low. This kind of coaching is more often a distraction than a helpful intervention. If teams are well designed and Essential dimensions are mature there will be little need for this kind of coaching.

Unhelpful Interventions should be very low. This kind of coaching undermines team self-management, empowerment, autonomy and mastery.

Team Effectiveness Self-Report: Healthy Attributes-Persist

The safety and inclusion we have on this team is unique...we really have each other's backs

Our central importance in providing the backbone to many of the other ITS services and departments...need to continually beat the drum on this however

The trust we have created on our team

Our ability to put our heads down and get the work done

Commitment, performance, reliability

Our stability as a team despite constant change bearing down on us

Nick: he goes to bat for us as a team...it's a great asset and it is very much appreciated

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Team Effectiveness Self-Report: Areas of Concern Requiring Attention

Need to shift the business model from a "bank" to a "supermarket"

More alignment with the larger organization...we are not "in the know"

The team leader is a bottleneck at present because he isn't in the office much and decisions are delayed

Speed in decision-making...we are too big and overly inclusive

Need to take more risks...fail faster

Nick to delegate more responsibilities to the team leaders

When stress goes up the walls go up between the silos

The division between the A Team members and the B team members: need to become one team

A new physical location that is closer to where the top IT leaders reside

Shifting from technical managers to becoming change leaders...requires a shift in our skills and mindsets

Our self-esteem is a bit low as a team...we need be more confident and blow our trumpet more in the organization in order to get the respect we deserve

A clear purpose, mission and focus...we are too fragmented

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Team: A-Team Project: Initial Evaluation

Org: Case Study