Building and Managing Teams

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Session objectives

- Develop the fundamentals for establishing a team.
- Develop a team charter and project plan.
- Clarify team roles and personality types.
- Define leadership responsibilities and functions.
- Understand how to lead through coaching.
- Understand and deal with communication issues.

The team management model

- Organize
- Coach
- Execute
Organizing your team

Organize

To begin organizing your team you will need to:
- Identify appropriate resources.
- Develop a team charter.
- Write team objectives.
- Develop and use a project plan.
- Identify the best personality types for your team.
- Assign appropriate roles to team members.

Resource considerations

- Human resources
- Team manager
- Team members
- Advisers
- Physical resources
- Space
- Equipment
- Supplies

Writing a team charter & objectives

Step 1: Transform your ideas about the team's vision.
Step 2: Prioritize the ideas.
Step 3: State the facts.
Step 4: Write your team objectives.
Weighted average time estimate

\[ Te = \frac{T_o + (4Tm) + T_p}{6} \]

- \( T_o \) = estimated time
- \( T_p \) = the most optimistic time
- \( T_m \) = the most likely time, based on experience
- \( T_o \) = the most pessimistic time (everything goes wrong)

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Weighted average time estimate

\[ Te = \frac{T_o + (4Tm) + T_p}{6} \]

- \( T_o \) = 1.5 days
- \( T_m \) = 20 days
- \( T_p \) = 30 days
- \( T_o \) = 9

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Causes of poor time estimates

- Inexperienced estimators
- Changes in project scope
- Deteriorating loss of enthusiasm
- Organisational politics
- Completely unforeseen circumstances
Developing and using a project plan

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

Guidelines for assigning roles

- Include all members.
- Review the project plan and identify appropriate roles.
- Tackle accountability.
- Establish a review process.

Team wrecker: corrective measures

<table>
<thead>
<tr>
<th>The Behavior</th>
<th>Corrective Measures</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Procrastinator</td>
<td>- Create a clear agenda for meetings, and include steps and deadlines for specific tasks.</td>
</tr>
<tr>
<td>The Arguer</td>
<td>- Suggest a private meeting to discuss concerns.</td>
</tr>
<tr>
<td>The Busy Body</td>
<td>- Consistently remind team members of the importance of direction and positive team communications.</td>
</tr>
</tbody>
</table>
Team wrecker: corrective measures (cont.)

**The Behavior**
- The Interrogator
- The Faker
- The Wanderer

**Corrective Measures**
- Don’t take sides.
- Investigate the reason for not participating.
- Openly share team roles and focus on how each member is an important contributor to the team.

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**Personal styles**

**Contributor**
- Challenger
- Communicator
- Collaborator

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**Leading is coaching**

**Coach**

To begin coaching your team you must:
- Assess management styles with which you have had experience.
- Determine your responsibilities as a leader.
- Understand the inner and outer qualities of a team coach.
- Recognize the differences between being a team coach and being a team controller or cheerleader.
- Build trust with the team.
Leadership responsibilities

- Coordinating work
- Ensuring progress is documented
- Keeping the team focused
- Organizing and facilitating team meetings
- Assigning and following up on action items
- Facilitating the decision-making process

Leadership responsibilities (cont.)

- Reinforcing positive behavior
- Giving guidance
- Building team spirit
- Resolving conflict
- Adjusting team membership, if necessary

Trust busters

- Invisible leader
- Erratic leader
- Disloyal leader
- Avoidant leader
- Dictator
The execution phase

**Execute**

To begin the execution phase you must:
- Conduct meetings efficiently.
- Hold team members accountable.
- Support effective decision making.
- Handle conflict successfully.
- Understand communication issues.
- Troubleshoot symptomatic behaviors.
- Keep your team on track.

Conducting meetings efficiently

**Statements for getting the group back on track:**
- "This is off topic from our agenda. Do you want to pursue this topic now or all together earlier?"
- "That's an interesting point but not relevant at this juncture. I'd be happy to put it on our next agenda.
- "Let's go back to the three areas we were focusing on."
- "We're off topic. Let's get back to our original mission."
- "Is this topic we want to discuss right now, or should we put it in the meeting plan?"

Five reasons plans fall through

1. Poor planning
2. Failure to address problems immediately
3. Not recognizing symptoms of trouble
4. Inappropriate role assignments
5. Poor follow-through/accountability
Variables that affect decision-making

- Time
- Need for ownership and involvement
- Knowledge and skill level
- Confidentiality

Options for gathering information

- Collect information from individuals. → Opinions??
- Collect information from a sub-group. → Validation??
- Collect information from the entire group at the time of the meeting. → Consensus??

Handling conflict

Task-based conflict

- Focus on the "what."
- Get everyone involved.
- Search for root causes:
  - Poorly designed work processes
  - Information overload
  - Inadequate resources
  - Unrealistic expectations
  - Lack of knowledge, skills, training

Relationship-based conflict

- Assume positive intent:
  - Check perceptions
  - Seek to understand
- Accept emotions.
- Focus on common goals.
- Value differences.
- Affirm commitment to change.
**Tips to avoid loaded questions**

- Rephrase questions into statements.
- Encourage others to share their "behind the scenes" thinking.
- Remember that direct communication does not mean putting people down.

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**Troubleshooting**

- If the team loses focus...
  - Revisit the team charter.
  - Break purpose or goal into smaller pieces.
  - Does the team leader have a role in the problem?

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**Troubleshooting (cont.)**

- If team lacks critical skills...
  - Deliver just-in-time training.
  - Provide coaching and mentoring.
  - Change team members (last ditch).
Troubleshooting (cont.)

- If team experiences negative dynamics...
- Review ground rules.
- Give individual feedback.
- Hold a mini-retreat to resolve the issue.

Troubleshooting (cont.)

- If team membership is a revolving door...
- Ask for a written commitment from new team members.
- Have team members sign a contract.

Measuring success

- Team debrief meeting
- Talking to members of the team individually
- E-mails
- Talking to the team's "customer"
Rewarding accomplishments

- Organization-wide recognition letter
- Small gifts
- Celebration meetings
- Positive group or one-on-one feedback
- Written certificates

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