



CHEMONICS INTERNATIONAL INC.

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Observations and Recommendations

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**Excellence, Inc. Teambuilding Event:
Observations and Recommendations**

Final Report
July 2005

The author's views expressed in this publication do not necessarily reflect the views of the United States Agency for International Development or the United States Government.

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Abstract

This report presents observations and recommendations of a one-day teambuilding event that involved the staff and Board of Directors of Excellence, Inc., the non-governmental organization established under a USAID grant through the AMIR Program. The teambuilding event was based on a popular personality and behavioral profiling tool, and focused on improving communication among team members.

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Executive Summary

This report presents comments and observations on a teambuilding event that was conducted for the staff and Board of Directors of Excellence, Inc. (EXI), the non-profit company recently established with USAID seed funding. The event was divided into two parts. The first part focused on work preferences, teamwork, and team composition; the second part focused on building and maintaining a high performance team. The main comment arising from the workshop is that the opportunity is forward movement in the relationship between the operating team and the Board of Director members. Translating the ideas and intentions expressed in the afternoon session will require firm and transparent decisions and commitments made by both parties. A meeting to reach that understanding is needed along with some short-term concrete actions to build momentum.

I. Introduction

Excellence, Inc. (EXI), a non-governmental organization established in October 2004 with USAID grant seed funds, recently and near simultaneously underwent a staffing change and an internal restructuring. Almost a completely new team of nine persons is now working with EXI clients, with the exception of the Chief Executive Office (CEO), two managers, and a consultant. Additionally, the Board of Directors (BOD) recently rotated, as required by the bylaws of EXI, although the Chairman remained unchanged.

Regarding the internal restructuring, until recently work was structured according to specialization by manager (e.g. process, finance, human resources, leadership) and each manager addressed the needs of one client. The CEO gave the team options on restructuring the company to meet new goals of expanding its operations to new business sectors and new services. Through a participatory process, the EXI team agreed on a hybrid structure whereby a manager would be responsible for certain services (e.g., strategic planning) and a certain sector (e.g., small and medium-sized enterprises, banking). This approach of management by service and/or products and customizing it that service of product according to different business sectors and new staff and BOD changes provide the basis for a much-needed team-building event.

II. Morning Session: Work Preferences, Teamwork, and Team Composition

The operating team demonstrated a keen interest in understanding their individual DISC profiles and the workplace implications. The team already seemed to possess a strong awareness of different individual work styles and the DISC approach simply provided a framework and vocabulary to express those differences. The team appears to be dealing with those differences in a largely healthy way with a strong dose of humor and a general sense of inclusion for all members.

The communication implications of the different work styles revealed that team members found a correlation between their natural and adapted preferences and between the ease or difficulty they had in working with their team members. The team suggested having each person circulate their communication preferences to the rest of the team as a first step in modifying their communication approaches to create less friction.

The presentation of the natural and adapted behavioral styles in terms of team composition raised the issues of correct balance and whether or not adapted styles are healthy and sustainable. While the team is fairly well balanced between outgoing versus reserved and people versus task orientations, there are some adapted profile areas related to task focus that are missing. The issue for the team is to determine if these areas need to be more represented and, if so, should it be handled through recruiting or management efforts to encourage individuals to further adapt their operating styles. Within the team there are a few individuals whose adapted behavior is significantly different from their natural behavior. The team discussed the reasons for this and did not identify any immediate need for changes. However, the management team should maintain an awareness of this and be sensitive to incremental changes that may be required.

III. Afternoon Session: Building and Maintaining a High Performance Team

Four board members joined the afternoon session, although the Chairman had to leave soon into the session. The session began with a look at the team life cycle and emphasized how to maintain performance through looking at renewal, direction and interaction. The team identified a number of qualities required for high performance.

The afternoon session highlighted that while the operating team seems to have passed through the “forming” and “storming” stages and are currently moving through the “norming” stage, and potentially into the “performing” stage, the larger team, consisting of the members of the Board of Directors (BOD), is still in the earlier stages of development. This reflects the recent addition to the BOD of members who attended the workshop. Much of the dialogue in this session dealt with how the BOD should be contributing and the “communication challenge” faced on both sides. The issues of role clarity and communication channels are the natural ones at this stage. The discussion was constructive with both sides expressing a desire to move through this stage of the team life cycle quickly.

Among the recommendations suggested by the team and the BOD were:

- Meetings scheduled well in advance with consistent days and times throughout the year. However there was some disagreement about who should put that schedule together.
- Participation by BOD members in sales calls and strategic reviews.
- Regular updates on the status of projects.
- Designation of responsible staff members to produce the needed communication. A new position for “Communication and Public Relations” is being filled this month.
- Policy for dealing with inactive BOD members.
- Using the upcoming September conference to enable greater “hands on” participation by BOD members. They are to receive all relevant conference materials this week.
- Provide BOD members with passwords to complete the DISC profile so they can fit into this same framework of understanding and discussion as the operating team.

The final exercise required the operating team and the BOD directors to work together to create a device to protect a raw egg, dropped from six feet, from breaking. The groups worked well together and the exercise was used to illustrate the need for everyone to contribute and the on-going effort required to keep at team performing at a high level and meeting demanding objectives.

IV. Conclusions

The operating team has weathered the initial challenges of the start-up period and seems well positioned to perform at a high level as a team. The Chief Executive Officer seems very comfortable in his role and the team seems very comfortable with him as well. The addition of new staff this month will represent a new challenge, but the team environment and norms seem firmly established. (Additional passwords for the DISC profile have been provided for the new members.)

The real opportunity from this workshop is forward movement in the relationship between the operating team and the BOD members. Translating the ideas and intentions expressed in the afternoon session will require firm and transparent decisions and commitments made by both parties. A meeting to reach that understanding is needed along with some short-term concrete actions to build momentum. The upcoming September conference may provide a significant opportunity to challenge BOD members for direct involvement as well as providing a steady flow of communications from the operating team. The conference also represents an opportunity for the team and the board to realize what can be accomplished when they are able to work together and, with it, an opportunity to celebrate a milestone event at the conclusion of the conference.

Annex 1: Agenda: Effective Teambuilding through DISCOVERY

Excellence Inc

Part One – Discovering Yourself and Your Teammates

9:30 – 9:45 Hoops! (Game)

9:45 – 10:15 DISC overview

10:15 – 10:30 DISC report/ profile/ descriptors

10:30 – 11:00 Perfect Day Exercise

11:00 – 11:20 Break

11:20 – 11:40 Adapted vs. Natural – Ideal Environment

11:40 – 12:00 Team Composition

Part Two – Effective Communication Practices

12:00 – 12:30 Mirroring Approaches to Communication

12:30 – 1:00 Do's and Don'ts of Communication (Exercise)

Part Three - Building the Roadmap

1:00 – 2:00 Lunch

2:00 – 3:45 Team Life Cycle

Teams at the Top

Determining Critical Issues/Action Plan

3:45 – 4:00 Break

4:00 – 4:30 Egg Drop – Teambuilding Exercise

Teamwork to the power of Eight - Summary

Annex 2: Teambuilding Event Notes

Teambuilding Workshop

Excellence Inc.



Facilitator: Stephen Collins

July 7th, 2005

Building High Performance Teams

“To be effective, therefore, you have to know the strengths, the performance models, and values of your coworkers.”

Peter Drucker

“High performance teams are extremely rare.”

(Katzenbach and Smith, The Wisdom of High Performance Teams)

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Effective Communication Patterns.....3

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 Small Number

 Complementary Skills

 Mutual Accountability

 Common Purpose

 Mature Character

 Common Approach

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Team Diagnostic and Prescription

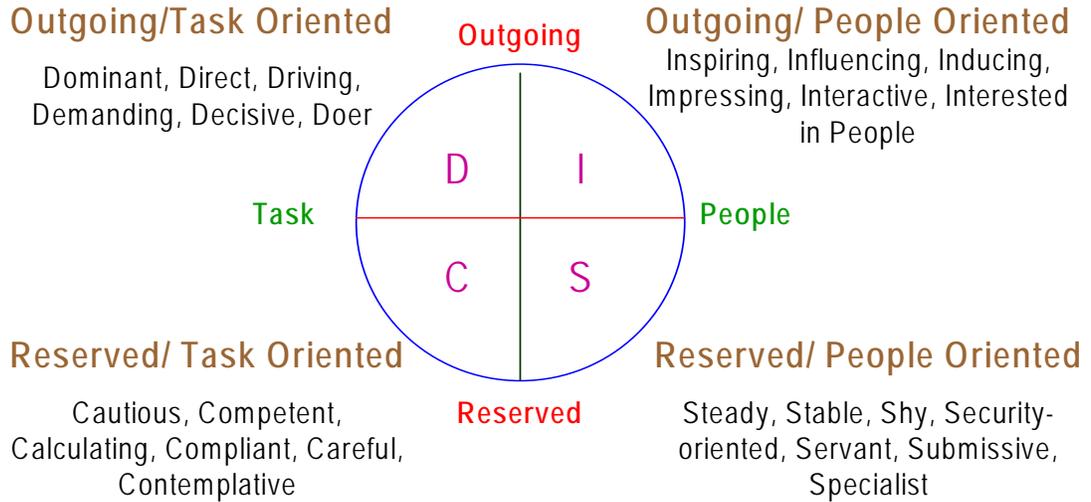
Three Dimensions of Performance

Leading Teams

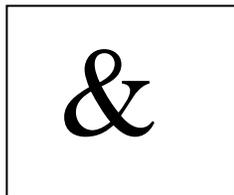
Teamwork to the Power of Eight

Team Checklist

The DISC Profile



DISC Measures.... Behavior



Emotions

Behavioral Types and Communication Patterns

The Buying Style: **D**ominant



Characteristics

Entrepreneur
Interested in new products
High ego factor
Does not waste time

Driving Forces for selling to them

Get to the Bottom line
Product must be credible
No testimonials, research
Emphasize the Bottom Line

The Buying Style: **I**nfluencer



Characteristics

Need to socialize
Glad to see you
Try out new, innovative,
and showy products

Driving Forces for selling to them

Provide recognition of their
accomplishments
Let them talk for a while
Don't dwell on detail
Support their dreams

The Buying Style:

Steadfast



Characteristics

May be shy
Suspicious
Slow to make changes
Likes traditional ways of doing things

Driving Forces for selling to them

Do not hard sell
Give time to think
Simple explanations
Explain details
Give assurances that their decision is right

The Buying Style: **C**ompliant



Characteristics

Very Suspicious
Slow to Change
Usually not talkative
Not an innovator

Driving Forces for selling to them

Find ways to minimize risk
Do not hard sell
Give a complete proposal
Explain details
Presentation must match sales material

Blending Style Matches

Disc Application

D – need to direct, challenge, desire to win, direct communication, innovative, forward looking

I -- need to interact, need to be liked, involvement, emotional, optimism and enthusiasm

S – need to serve, logical, humorous, relaxed, dependable, team player

C – need for procedures, precise details, task oriented, perfectionist

Good Matches

D - D

I - I

S - S

C - C

D - I

Bad Matches

D - C

I - C

Average Matches

D - S

I - S

C - S

Team Performance Curve

(Katzenbach and Smith, The Wisdom of Teams)

Working Group: A group for which there is no significant incremental performance need or opportunity that would require it to be a team. The members interact primarily to share information, best practices, or perspectives and to make decisions to help each individual perform within his or her areas of responsibility.

Pseudo-team: A group that there could be significant, incremental performance need or opportunity but it has not focused on collective performance and is not really trying to achieve it. In pseudo teams, the sum of the whole is less than the potential of the individual parts.

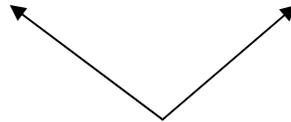
Potential team: A group for which there is a significant, incremental performance need, and that is really trying to improve its performance impact. Typically it requires more clarity about purpose, goals, work-products, and more discipline in hammering out a common working approach.

Real Team: A small number of people with complementary skills who are equally committed to a common purpose, goals, working approach for which they hold themselves mutually accountable.

High Performance Team: A group that meets all the conditions of real teams, and has members who are deeply committed to one another's personal growth and success.

Effective Working Groups and Real Teams

Single Leader Work Group	Real Team
Individual goals add up to the team's purpose	Compelling performance purpose exceeds sum of individual goals
Members work mostly on individual tasks that match their skills	Members work jointly to integrate complementary talents and skills
Work products are mostly individual	Work products are mostly collective or joint efforts*
Rigorous work approach driven by leader	Adaptable work approach shaped and enforced by members
Strong individual accountability	Mutual plus individual accountability



Group Fundamentals

Understand the charter – What is our purpose?
Good communication
Defined roles
Time efficient processes
Reasonable accountability

***Collective Work Products:**

- Two or more people with multiple skills working together
- Leadership roles that shift
- Joint, or mutual accountability for results that cannot be obtained without more than one person being responsible

Working Group or Team?

Your group consists of a market researcher, a management consultant, a sales representative, and a product engineer.

Based on the performance challenge, would you select a working group or team? Why?

Challenge #1: We need to know if our customers value price more than quality.

Challenge #2: We need to reduce production cycle times by 22%.

Challenge #3: We need to increase customer satisfaction by 40%.

Challenge #4: We need to upgrade the skill level of our workforce to exceed industry standards.

Challenge #5: We need to develop a high growth strategy to capture emerging opportunities in the international market.

In your current assignment are you using a working group or team approach?

List some of your key performance challenges? For each one determine if you should be using a working group or a team.

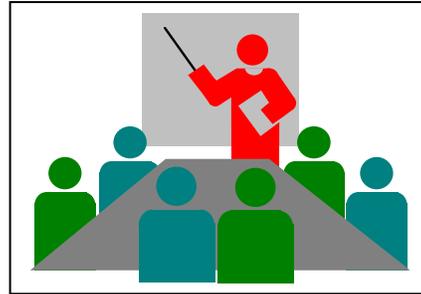
Team Roadmap: Components of Successful Teams

- **Small Number**

The Problem with Large Numbers...

Meetings - Cannot easily or frequently meet
Must be very efficient and to the point

Leadership - Need hierarchical leadership
Stable Roles for all members



Shared Understanding – Only a broad agreement possible on the vision because lack of mutual accountability and dialogue

- **Complementary Skills**

Avoid the Trap: Focusing only on existing skills when selecting your team. Research shows that much of the team's learning will occur **after** the team is formed not **before**.

Action that can build and transfer skills:

- Work assignments
- Collective work products
- Assessment of progress against work products
- Ad hoc contributors
- Training and Education

Selecting the Team:

Identify the needed skills in each area to meet the challenge:

Functional _____

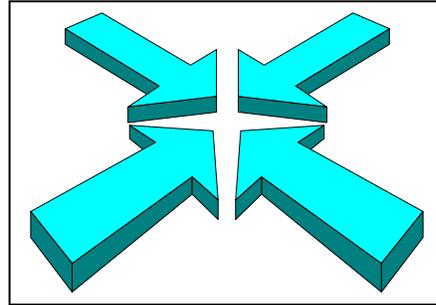
Problem solving and decision making _____

Interpersonal skills _____

Determine how the prospective team member might contribute:

What specific challenges and learning opportunities will this person face:

- **Mutual Accountability**



Key actions

- Promote flexible roles.
- Allow all team members to have an equal voice in decision making and problem solving dialogues. Watch out for higher ranking members of the team getting too much “air time.”
- Assign work based on skills not on titles.
- Treat everyone the same. Even the formal leader should be expected to abide by the team norms.
- Force decision making to come from a broad range of sources within the group and not just the formal leader.
- Don’t allow the strong personalities to dominate and don’t let the shy team members just sit quietly.
- Discipline disruptive or non contributing team members.

Common Purpose

Four Types of Mission

(Jim Collins, Beyond Entrepreneurship)



- Targeting: Set a clear, well defined target and aim for it.

NASA

“Put a man on the moon by the end of the decade.”

- Common Enemy: Pick a common enemy to seek out and destroy.

NIKE

“Our idea of a perfect day is to get up in the morning and throw rocks at our competitors.”

- Role Model: Use organizations you admire as images of what you want your company to become.

Trammel Crow

“To be the IBM of the real estate industry.”

- Internal Transformation: Used on organizations in need of dramatic restructuring.

GE

“We are committed to developing the sensitivity, the leanness, the simplicity, and the agility of a small company.”

BHAGs (Big, Hairy, Audacious, Goals)

- Are so clear and compelling that it requires little explanation. It is a goal not a statement. If it doesn't get people excited, it is not a BHAG.
- Fall well outside the comfort zone. People believe it can happen but it will require heroic effort and perhaps some luck.
- Should be so bold and exciting in their own right that it would continue to stimulate progress if the organization's leaders disappeared before it had been completed.
- Should be consistent with the company's core ideology.

• **Mature Character**

In Search for the Right Team Members

(Dan Reiland)

When discerning potential for leaders and team members, look for:

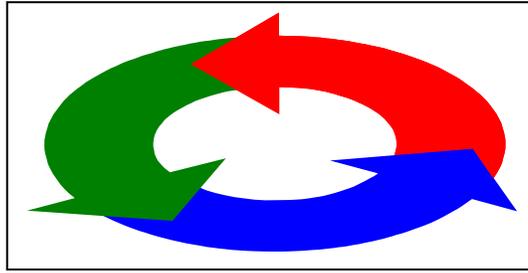
- A willingness to follow - This reveals their attitude
- A willingness to sacrifice - This reveals their perspective on life
- A willingness to learn - This reveals the condition of their ego
- A willingness to serve - This reveals their heart
- A willingness to be honest - This reveals their maturity

Quotable

“In choosing people for top positions, you have to try to make sure they have a clear sense of what is right and wrong, a willingness to be truthful, the courage to say what they think and to do what they think is right, even if the politics militate against that. This is the quality that should really be at the top. I was too often impressed by the intelligence and substantive knowledge of an individual and did not always pay enough attention to the question of how honest, courageous and good a person the individual really was.”

Former CEO Unisys

- **Common Approach**



Common Issues

- The work itself: How will the work be done? Who does what?
- Administration and logistics: Scheduling of meetings and vacations, preparing budgets and expense reports
- Norms of behavior: Seek first to understand and then be understood or get in your colleagues face and be brutally honest
- Decision and choice making: How do we make the critical and not so critical choices?
- Evaluation of progress: How are we doing?

Best Practices for Developing an Effective Work Approach

- Use initial meetings to explicitly discuss challenges, issues, and approaches.
- Make meetings purposeful and issue driven.
- Seek visible, early wins.
- Establish a **few** clear expectations about rules and behaviors.
- Introduce outside perspectives.
- Build shared understanding rather than consensus.
- Create meaningful language unique to the team.
- Develop ways to provide constructive feedback.

Build Shared Understanding through Enlightened Disagreements

(Katzenbach and Smith, The Discipline of Teams)

Go ahead and disagree! In fact, welcome, encourage, and celebrate disagreement.

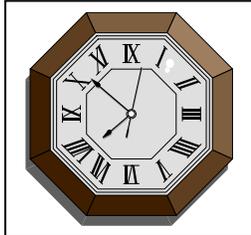
Whenever a serious disagreement arises use the following exercise:

1. Identify the team members involved and label their positions in some convenient way.
2. If disputants need facilitation, appoint someone on the team as a referee.
3. Let the debate continue until those involved seem to be repeating themselves.
4. Now ask each person to articulate the opponent's point of view. The team should judge whether they have done this adequately. If not they need to try again.
5. Ask others to identify the best parts of both participants' ideas.
6. Finally, have the team consider if there are ways to get the best from both sets of ideas.

Team Meetings

Two Typical Patterns

Meeting ends at 12:03



Who wants to talk?



1. Define the Purpose of the Meeting

What do we need to accomplish?

Who needs to contribute?

What kind of advance preparation is needed?

Are there potential obstacles that will surface during the meeting?

What kind of learning or knowledge transfer should take place?

2. Categorize issues and topics as they come up during the meetings.

Category #1: Deal with it now!

Category #2: Assign it to appropriate individual or group with an assigned time frame

Key questions:

Does the topic require the skill and experience of the whole group or does one person have the ability to deal with it?

Does the issue require both individual and collective work?

Does the outcome of this topic directly impact the team's understanding of common purpose?

Is the group sufficiently prepared to discuss the topic intelligently?

Team Stages

Forming

Getting to know each other. Feelings of uncertainty and anxiety of the group's purpose. Individual concerns about fitting in. Members are superficial and polite.

Facilitator's role: help group develop its vision, purpose, and agenda.

Storming

Dissatisfaction with the group; reality does not live up to expectations

Facilitator's role: Provide support to members ; develop and use skills; refined and remind purpose; Encourage openness and resolve conflicts

Norming

Agreeing a way forward; coming to terms with all the expectations of the individual group members; agreeing rules for working; operating norms and procedures; focus common goals; feeling of belonging

Facilitator's role: Help retune the process; put responsibilities back on group members for agenda, meeting dates, and times.

Performing

Production and progress stage; group is achieving its task; things are getting done; relationships are working well.

Facilitator's Role: Monitoring and occasional reviews; lets group get on with task.

Adjourning

When the group disbands; saying farewells; formal end of project; moving away and onwards.

Facilitator's role: Prepare group for transition away from group; use some final feedback techniques; agree on definite end date and activity.

Team Diagnostic and Prescription

(“Teams at the Top,” *McKinsey Quarterly*)

“Happy families are all alike; every unhappy family is unhappy in its own way.”

Leo Tolstoy

Symptoms

Confused Direction

- Lack of Alignment
- Lack of Deep Understanding
- Lack of Strategic Focus



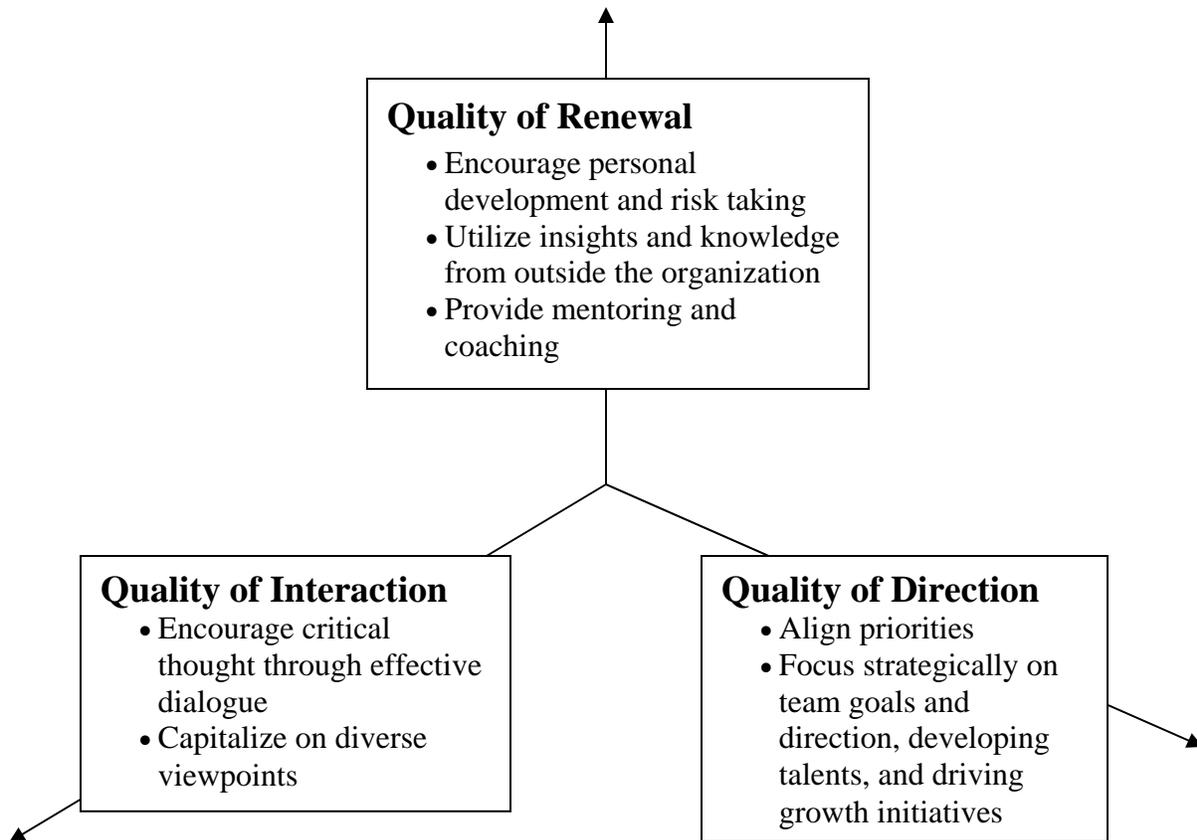
Ineffective Interaction

- Poor Dialogue
- Dysfunctional Behavior

An Inability to Renew

- Personal Dissatisfaction
- Insularity (an inward focus)
- Deficient Individual skills

Three Dimensions of Performance



Building Performance

Address a number of issues concurrently

Achieve tangible outcomes in a variety of management challenges such as framing strategy, managing performance, and reviewing talent.

Channel the team's discontent

Invite external challenges, focus on competitive threats, and judge performance by best practices.

Minimize outside intrusions

Let real work dominate the improvement process. Teams must discover what is effective for them.

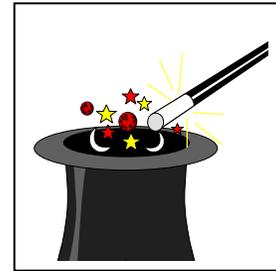
Encourage inquiry and reflection

Facilitate team cycles of action and reflection.

Leading Teams

The Trick:

Leading the team and being one of the team



Keep the team focused on the purpose and the goals but as a team member avoid making ideas and suggestions sound like orders.

Build commitment and confidence through positive feedback and avoid intimidation. Demonstrate a willingness to be mutually accountable.

Relate learning and skill development to actual contribution.

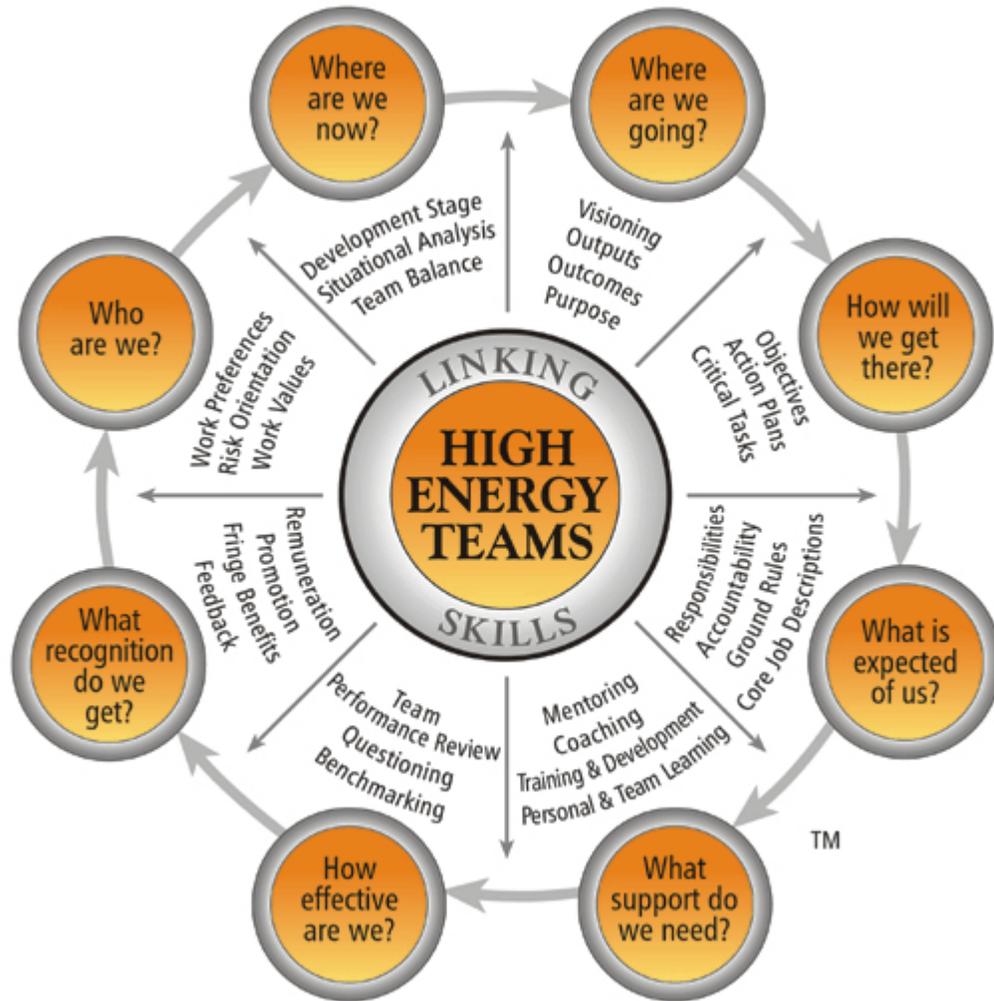
Monitor outside relationships to promote opportunities and remove obstacles. Allow other team members to play a lead role in some of these relationships when appropriate.

Emphasize opportunities for others on the team. The leader always gets first pick of the best opportunities. He can use these to emphasize the team's core values and work practices.

Do real work. Leaders need to be the ones who take the high risk or "dirty" jobs and do an equivalent amount of work as everyone else on the team.

Teamwork to the Power of Eight

Team Management Systems



Who are we?

Each person in a team brings different strengths to the team effort and will approach problems in a different way. Team members need to know 'what makes each person tick' so that individual differences can be harnessed to achieve maximum performance levels.

Where are we now?

Before planning where you are heading as a team, it is useful to assess the key **Strengths**, **Weaknesses**, **Opportunities** and **Threats** of your team. This analysis will help you determine whether you have the resources to achieve your vision.

Where are we going?

To work with energy, commitment and enthusiasm, a work team needs to know where it is going. It has to have a vision which is aligned with the organization's mission and goals.

How will we get there?

To turn a vision into reality, it is necessary to systematically set objectives, action plans and measures of performance. It is important to plan the route from where you are now to where you want to be.

What is expected of us?

People are unable to perform if they don't know what they are meant to be doing. In a high energy team, all team members will fully understand their job description, their role in the team, what they are responsible for and, most importantly, what they are accountable for.

What support do we need?

If you and your team are to achieve the vision you have established then support is necessary in the way of training and development, facilitation, coaching, counseling and just general acquisition of skills.

How effective are we?

A high energy team is one which regularly reviews its effectiveness and continually improves its performance. Benchmarks for success can be established and procedures for learning from mistakes implemented.

What recognition do we get?

In general, most teams will not attain high energy levels unless there is adequate recognition for the accomplishments of all team members. This can be achieved through feedback, remuneration, fringe benefits and promotion.

The Teamwork Checklist

	Mostly Yes	Mostly No
1. Members of the group regard themselves as being part of a team.	_____	_____
2. Group discussion is frequent, and it is usually pertinent to the task at hand.	_____	_____
3. Group members understand what they are trying to accomplish.	_____	_____
4. People listen to each others' suggestions and ideas.	_____	_____
5. Disagreements are tolerated and an attempt is made to resolve them.	_____	_____
6. The group members pull for each other.	_____	_____
7. The group likes to compete against other groups.	_____	_____
8. Should one member falter, the others would help that person.	_____	_____
9. There is a well established, relaxed working relationship among the members.	_____	_____
10. There is a high degree of trust and confidence among leaders and subordinates.	_____	_____
11. The group members strive hard to help the group achieve its goal.	_____	_____
12. Suggestion and criticism are offered and and received with a helpful spirit.	_____	_____
13. There is cooperation rather than a competitive relationship among members.	_____	_____
14. We often meet together outside of regular hours, including meals together.	_____	_____
15. The leader and members hold a high opinion of the group's capabilities.	_____	_____
16. We share ideas and opinions on many tasks.	_____	_____
17. There is ample communication within the group on topics relevant to getting the work done.	_____	_____
18. Group members feel confident in each others' decisions and judgments.	_____	_____
19. We enjoy many laughs together.	_____	_____
20. The leader of the group coordinates our activities but does not dominate us.	_____	_____