

 THE CHECKLIST SERIES

MANAGING OTHERS

TEAMS AND INDIVIDUALS

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Introduction

It is now over forty years since I first became a manager, but I can still remember the trepidation with which I faced the new challenges of the role in those first days. Like many, if not most, new managers, I had moved straight from a technical position and had to learn fast.

There are of course technical aspects of management, but above all management is about people and making the transition from doing a good job oneself to getting the best out of other people. While we all need to develop a management style appropriate to our own personality, there are many well-tried approaches to use.

That is what this book addresses in a series of comprehensive checklists that cover, in practical and helpful detail, most of the ways in which a manager is likely to interact with others, both below and above him or her in an organisation. Each checklist starts with a description of a typical situation (team briefing, for example), followed by a detailed list of action points and a reminder of key things to avoid.

Usefully interspersed among these checklists are short profiles of some of the great management gurus, from Herzberg and Maslow to Adair and Bennis. While describing their theories, these sections also comment on ways in which others have developed or challenged their views – an important reminder that the changing structure of organisations (for example the flatter structures made possible by modern technology) may well require the original approach to be modified.

At a time when we have to look to business to pull us out of recession, we need all our managers to be as effective as possible right from the start of their managerial careers. This book, together with the rest of the CMI checklist series, is an invaluable aid in that objective, while also providing useful advice on how to handle specific situations that may occur less often, such as how to deal with 'plateaued performers' for example. Bullying is covered too – importantly, because CMI research suggests that sadly this is still all too common in the workplace. This practical guide is well designed and easy to use. I thoroughly recommend it.

Sir Anthony Cleaver
Chairman, Novia Financial plc

Steps in successful team building

A team is more than just a group of people who happen to work together. It is a group of people working towards common goals and objectives and sharing responsibility for the outcomes. Team building is the process of selecting and grouping team members effectively, and developing good working relationships and practices that enable the team to steer and develop the work and reach their goals. Increasingly, a team may be composed of people drawn from different functions, departments and disciplines who have been brought together for a specific project.

The use of workplace teams to carry out projects of various kinds has become widespread. Teams can play a key role in organisational success, but the development of good working relationships is crucial to team performance. Organisations that take the time and trouble to invest in the development of positive interaction and cooperation in teams will reap the benefits of improved morale, more effective performance and the successful completion of projects.

Successful team building can:

- coordinate the efforts of individuals as they tackle complex tasks
- make the most of the expertise and knowledge of all those involved, which might otherwise remain untapped
- raise and sustain motivation and confidence as individual team members feel supported and involved

- encourage members to bounce ideas off each other, solve problems and find appropriate ways forward
- help break down communication barriers and avoid unhealthy competition, rivalry and point-scoring across departments
- raise the level of individual and collective empowerment
- enhance engagement with and ownership of the task in hand.

This checklist provides an outline of the main steps in the development of workplace teams, but does not cover aspects specific to virtual or remote teams.

Action checklist

1 Consider whether you really do need a team

Don't assume that a team is necessarily the best way of achieving the objectives you have in mind. Think carefully about the tasks that need to be completed and the skills required before forming a team. Teamwork may not always be the best approach – it may be difficult, for example, in an organisation with a culture of rigid reporting structures or fixed work procedures. Ask yourself whether one person with the relevant knowledge and skills could carry out the task more effectively.

It is also important to weigh the advantages and disadvantages of teamworking – there may be losses in coordination and motivation if teams are not carefully developed and managed. Consider whether there is a need for a mix of skills and experience, the sharing of workloads, or brainstorming and problem solving. In such cases a team will often be the best option.

2 Define objectives and the skills needed to reach them

Think carefully about the nature of the tasks or projects to be carried out by the team and the mix of knowledge and skills needed. For teams handling routine tasks on a long-term basis, low levels of diversity in the team and clear definitions of tasks

and roles are required. In this context, the main aims would be high levels of team cohesion and commitment and low levels of conflict.

For innovation and problem solving, however, high levels of diversity and complementary skills will be required and the definition of goals and roles may be left to the team. This might involve losses in coordination, much less cohesion and fairly high potential for conflict, but could be worthwhile if new ideas and solutions are required.

3 Take team roles into account

The work of R. Meredith Belbin provides some useful insights into the patterns of behaviour exhibited by team members and the way they interact with each other. You may wish to take these into account when putting a team together or seeking to shape an existing team. Belbin identifies a number of roles which team members can play and their respective strengths and weaknesses. He suggests that teams need a balance of members with differing roles if they are to work together effectively. Furthermore, an understanding of personal differences and roles can help team members to cooperate more successfully, complementing each other's strengths.

4 Plan a team-building strategy

Invest time at the outset in getting the operating framework right so that the team will develop and grow.

The following aspects should be considered:

- **a climate of trust** – where mistakes and failures are viewed as learning experiences, not occasions to apportion blame
- **the free flow of information** – to enable team members to integrate their work with business objectives
- **training** – in interpersonal skills, including communication and negotiation. Training may also be needed in handling the tasks required and taking responsibility for them. Team leaders will

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need project management skills and the ability to manage meetings and moderate discussions

- **time** – ensure that the team has the time needed to coordinate activities, develop thoughts and ideas, monitor progress and hold regular meetings, and has access to the resources needed to achieve its objectives
- **resources** – make sure that the team has access to any resources and materials it needs to complete the work
- **objectives** – these need to be clearly understood by all team members. This is increasingly a matter of involving team members in setting objectives rather than dictating prescribed objectives to them
- **tasks and roles** – team members must be absolutely clear about what is expected of them and what tasks have to be carried out
- **feedback** – everybody needs to know how well they are doing and if and where improvements can be made. Feedback should focus primarily on the positive aspects and on ways of addressing any problems or difficulties.

5 Get the team together

At the initial meeting you should aim to start building the team as a team rather than a collection of individuals. Discuss and agree the outcomes the team is to achieve, rather than attempting to address the detailed issues involved in the project or task. Bear in mind that most teams pass through several stages of growth before starting to produce their best work. Bruce Tuckman's 1965 model of team development presents this process in the following stages:

- **forming** – as team members come together
- **storming** – as they work through the issues
- **norming** – as conflicts are resolved and working practices and expectations are established
- **performing** – as objectives are achieved.