# Lead team effectiveness

**Learner Guide**

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# 1. Plan to achieve team outcomes

## 1.1 – Lead the team to identify, establish and document team purpose, roles, responsibilities, goals, plans and objectives in consultation with team members

A team is a group of people with common interests who are working together to achieve or work towards the same or a similar goal. They make decisions based on achieving targets or outcomes, and benefit from collective results that are produced as part of that team.

A group is, for example, people who are watching a football game together at a stadium.

A company or organisation consists of a group of people who work together to achieve goals set by the organisation. These goals are usually found in the Mission or Vision Statement.

Leading a successful team is one of the challenges faced by managers today. Effective managers understand the importance of leading a high performance team to ensure that organisational objectives are met, achieved and surpassed when possible.

Organisations supply a good or a service to customers. The customer pays for the good or service and the company or organisation makes a profit.

Teams work to make the goods or service on offer better, more affordable, or able to increase profit.

There are a number of different types of teams that function within an organisation.

**These include:**

- ➢ Management/executive teams
- ➢ Project teams
- ➢ Support team
- ➢ Functional teams
- ➢ Production teams
- ➢ Specific work teams
- ➢ Special purpose teams
- ➢ Directed work teams

Managers can often work for one team or across a range of different teams. Managers need to communicate the shared vision and mission for the organisation, so that the team members are aware of the goals and objectives they are trying to reach (both individually and as part of the team as a whole).

All team members should be fully aware of the expectations of their job role and job function, and how it relates directly back to the team environment.

There are a number of different areas where expectations of teams can derive from.

**These areas could be:**

- ➢ Internal staff
- ➢ External customers or clients
- ➢ Different teams within the organisation
- ➢ Senior management
- ➢ Executive board members

➢ Government departments

➢ Industry associations

Team goals need to be identified and developed under the SMART format. This simply means that goals need to be aligned to the organisational objectives and staff members need to be able to check when they are achieving these goals.

**SMART** stands for:

**S** Specific

**M** Measurable

**A** Achievable

**R** Relevant

**T** Timely

### Specific

The goal must indicate a specific action so there is no ambiguity on whether or not it was achieved.

### Measurable

The goal must be visible, audible or able to be measured, in order to determine if it has been achieved.

### Achievable

The goal itself must be realistic and achievable, so that team members are not overwhelmed with the possibility of reaching the goal.

### Relevant

Is the goal relevant to the organisation and the objectives or outcomes of the Mission or Vision Statement?

### Timely

Is the goal able to be reached within a reasonable time frame?

*Each team member should be clear on their role, expectations within the team and how their contribution will assist the team to move forward and become successful.*

## 1.2 – Engage team members to incorporate innovation and productivity measures in work plans

### Innovation and productivity measures

It is important that work team outcomes are planned with innovation and productivity in mind – that is, you want to be as efficient as possible in your work processes and strive to find the best way to do things.

Look at your team and the skills that individuals possess – can these be utilised to make the team as a whole more productive? Can the combination of attributes make a desirable whole?

There will be a range of personalities and outlooks in your team. You should take the time to talk to your team members and understand who they are and what motivates them. By finding out more information you can find the best way to utilise each individual's skills and to promote innovation within your team.

**Potential new team members**

If you evaluate that additional skills and work tasks would greatly benefit the direction and growth of your team, you could look to adding new personnel to fill the gaps. If you are looking to expand your team and have the budgetary allowance from your organisation to do so, you should include them in your findings so that they are aware of any potential changes. It is important not to isolate individuals or your team as this will undo some of the good work that you have started.

**Information about current or potential team members' work may relate to:**

➢ **Interests:** Your team may have common shared interests and/or belong to a sports team which promotes an excellent team spirit, or you may find that some individuals have specific interests outside of work which takes a lot of their time and energy. You should consider how your team spend their time outside of work in order to maintain a healthy work/life balance.

➢ **Lifestyle preferences:** Understand your team members and who they are as individuals. You may have staff with family/childcare commitments who need to have structured working hours, or staff who work early or late and have no set working pattern.

➢ **Past jobs:** This will indicate their work experiences gained and also the kind of company cultures they have been a part of. It will also show previous achievements and skills that may prove relevant but are as yet may be an untapped resource.

➢ **Technical strengths:** You need to know your team's capabilities and leanings, for example, if you have an individual that has a real flair for data analysis, encourage them to use this skill.

➢ **Work preferences:** Look at the preferences that your team have with work tasks they perform and use this as a way to build upon the skills of the team. Try to incorporate as many of your team member's preferred aspects to suit individuals. This will encourage an increase in positive energy and a more innovative approach through the tasks that are enjoyed.

> ➢ **Working/Teamwork styles:** Check the different ways that your team members work, you may have some individuals who relish the team environment and enjoy a competitive rapport, alternatively you may have individuals who prefer set tasks that they can work through independently of others. Both are of equal importance and should be nurtured to increase your team's strengths.

**You should also look at developing the following characteristics within your team:**

> ➢ Ability to take direction and show initiative
>
> ➢ A positive, proactive approach
>
> ➢ Productivity
>
> ➢ Flexibility
>
> ➢ Integrity, honesty and loyalty
>
> ➢ Willingness to learn and progress
>
> ➢ Communication and interpersonal skills.

**You should work with the team dynamics and use this effectively to develop an innovative team that works well together.**

<u>Motivation</u>

How willing are your team members to embrace taking on challenges and working innovatively? Do they have the ability to take on these new challenges?

You should talk to your team members and assess how they feel about the changes. Look to support them in any areas of learning or with motivation, some personnel may find changes at work uncomfortable or even a little scary. You may find that some are not convinced that any changes will happen at all. By supporting their needs, you can break down the barriers they may have and ultimately improve their work experiences. It may take time, but look at the individual and try to nurture their needs towards achieving team-wide purpose and working innovatively together.

**To help your team in their tasks, you should look to developing the following requirements for cooperation within your team:**

> ➢ Share management of tasks
>
> ➢ Planning tasks
>
> ➢ Organising tasks
>
> ➢ Setting performance targets
>
> ➢ Assessing team performance
>
> ➢ Encouraging your team to develop their own strategies for change
>
> ➢ Obtaining the required resources.

By giving your team certain responsibilities in structuring their needs, you will develop accountability within your team. You should allow them to develop their own working practices with you and build upon a mutual trust and commitment to the goals of the team.

## Complementary skills

Other teams and personnel within your organisation may have complementary skills that could benefit your team. Technical expertise to complete tasks – the fundamental skills needed to physically perform tasks, problem solving and decision making – the ability to take action, and interpersonal skills – to be able to work effectively with others. These are important skills that your team will need to carry out their work and should develop these skills and look to others for support if needed.

### Different levels of staff

It is helpful to include all levels of staff in your discussions with your teams. All will bring their own perspectives and add valid contributions from their experiences. It is more commonplace to see managers and directors interacting with their employees. This is a much healthier working environment for all and helps to promote a cross-over of skills and ideas.

**To help the cross-fertilisation of ideas you should:**

➢ Bring experienced individuals in who can spark ideas

➢ Bring in technical advisors to make your team aware of the technical possibilities

➢ Bring in individuals who have no knowledge of your work for fresh perspectives.

### Add your own comments

Rather than just overseeing the process, you should also sit with your team and suggest possible ideas for them to consider. From your evaluations and task to promote innovation, you will be able to see other directions that could be taken and you should be open with your team on this. Discuss your thoughts, ask your team what they think and be open to some frank discussions. Your team need to know that you are with them so that they can respond correctly to your motivations.

**Talking to others will help your team to gain:**

➢ Fresh perspectives

➢ Unbiased feedback

➢ New ideas.

This will empower your team with knowledge and encourage a more innovative approach to achieving new goals. It is about drawing forth information from all sources available to you and your team to make progress. From a range of thoughts you can bring forth more developed ideas and generate real working possibilities for your team.

## Productivity

Productivity is all about streamlining processes to make them more efficient. How you make the workplace more efficient will depend on the environment you work in.

Productivity can often be improved by simple organisation – having a clear idea of who is doing what and the time this will take will allow you to assign tasks so there is limited downtime between them. Poor organisation can lead to task overlap and periods of time where staff are waiting around with no job to do.

**Examples of productivity measures may include:**

➢ Using new technology

➢ Providing adequate training

➢ Combining complementary skill sets

➢ Organising schedules

➢ Incentives

➢ Goal setting

➢ Deadlines

➢ Clear instructions

➢ Support for team members

➢ Supervision of tasks

➢ Implementation of templates/standard procedures.

## 1.3 – Lead and support team members in meeting expected outcomes

There are a number of ways in which a manager can support their team to achieve and meet the outcomes expected of them, both from a team perspective and from an organisational perspective.

**These include, but are not limited to:**

➢ Maintaining honest communication at all times

➢ Encouraging regular meetings and updates

➢ Setting expectations during the course of employment

➢ Managing staff using Performance Management Plans or annual reviews

➢ Being aware of issues that require assistance

It is imperative that a manager determines the best type of team required to fulfil a role and then chooses staff members that would suit the needs of the team, based on their strengths and interests.

Dr Meredith Belbin developed the Belbin Team Inventory, which is an assessment tool that gained insight into how a team member's behaviour was displayed within a team environment. It is not a psychometric instrument – rather it is a behavioural tool and scores staff members on how strongly they express traits from different team roles.

**The team roles consist of the following (reference: West M (1994) Effective Teamwork; The British Psychology Society):**

### Plant

The plant is a specialist idea maker characterised by high IQ and introversion, while also being dominant and original. The plant tends to take radical approaches to team functioning and problems. Plants are more concerned with major issues than with details. Weaknesses are a tendency to disregard practical details and argumentativeness.

### Resource investigator

The resource investigator is the executive who is never in his room, and if he is, he is on the telephone. The resource investigator is someone who explores opportunities and develops contacts. Resource investigators are good negotiators who probe others for information and support and pick up other's ideas and develop them. They are characterised by sociability and enthusiasm and are good at liaison work and exploring resources outside the group. Weaknesses are a tendency to lose interest after initial fascination with an idea, and they are not usually the source of original ideas.

## Co-ordinator

The co-ordinator is a person-oriented leader. This person is trusting, accepting, dominant and is committed to team goals and objectives. The co-ordinator is a positive thinker who approves of goal attainment, struggle and effort in others. The co-ordinator is someone tolerant enough always to listen to others, but strong enough to reject their advice. The co-ordinator may not stand out in a team and usually does not have a sharp intellect.

## Shaper

The shaper is a task-focused leader who abounds in nervous energy, who has a high motivation to achieve and for whom winning is the name of the game. The shaper is committed to achieving ends and will 'shape' others into achieving the aims of the team. He or she will challenge, argue or disagree and will display aggression in the pursuit of goal achievement. Two or three shapers in a group, according to Belbin, can lead to conflict, aggravation and in-fighting.

## Monitor evaluator

According to the model, this is a judicious, prudent, intelligent person with a low need to achieve. Monitor evaluators contribute particularly at times of crucial decision making because they are capable of evaluating competing proposals. The monitor evaluator is not deflected by emotional arguments, is serious minded, tends to be slow in coming to a decision because of a need to think things over and takes pride in never being wrong. Weaknesses are that they may appear dry and boring or even over-critical. They are not good at inspiring others. Those in high level appointments are often monitor evaluators.

## Team worker

Team workers make helpful interventions to avert potential friction and enable difficult characters within the team to use their skills to positive ends. They tend to keep team spirit up and allow other members to contribute effectively. Their diplomatic skills together with their sense of humour are assets to a team. They tend to have skills in listening, coping with awkward people and to be sociable, sensitive and people-oriented. They tend to be indecisive in moments of crisis and reluctant to do things that might hurt others.

## Implementer

Implementers are aware of external obligations and are disciplined, conscientious and have a good self-image. They tend to be tough-minded and practical, trusting and tolerant, respecting established traditions. They are characterised by low anxiety and tend to work for the team in a practical, realistic way. Implementers figure prominently in positions of responsibility in larger organisations. They tend to do the jobs that others do not want to do and do them well: for example, disciplining employees. Implementers are conservative, inflexible and slow to respond to new possibilities.

## Completer finisher

The completer finisher dots the i's and crosses the t's. He or she gives attention to detail, aims to complete and to do so thoroughly. They make steady effort and are consistent in their work. They are not so interested in the glamour of spectacular success. Weaknesses, according to Belbin, are that they tend to be over anxious and have difficulty letting go and delegating work.

## Specialist

The specialist provides knowledge and technical skills which are in rare supply within the team. They are often highly introverted and anxious and tend to be self-starting, dedicated and committed. Their weaknesses are single-mindedness and a lack of interest in other peoples' subjects.

Once a manager has determined which staff members have strengths required to completed a function within the team, they can then allocate the team accordingly.

**Team members can be supported in the following ways:**

> ➢ If team members do not get along, the manager should intervene and either change the team or conduct some form of conflict resolution to ensure that the team is working effectively

> ➢ Managers can ensure everyone knows their duties and responsibilities within the team

> ➢ Team members are monitored regularly to ensure they understand their responsibilities

> ➢ Outcomes and objectives are reviewed as required to make sure the team is keeping in

# 2. Lead team to develop cohesion

## 2.1 – Provide opportunities for input of team members into planning, decision making and operational aspects of work team

## 2.2 – Encourage and support team members to take responsibility for own work and to assist each other in undertaking required roles and responsibilities

The more empowered team members are within the team environment, the more likely they are to be productive, dedicated and committed to the objectives.

**An effective team will always have a number of the following qualities and attributes:**

> ➢ A sense of team belonging
>
> ➢ Members of the team will respect each other and work well together
>
> ➢ Co-operation
>
> ➢ Open communication
>
> ➢ A common goal and sense of purpose
>
> ➢ The ability to plan according to team goals
>
> ➢ Decision-making capabilities
>
> ➢ Effective leadership

## Planning

Team members should be given guidance on the best way to plan for contingencies and situations that can arise when working towards a common goal.

**Planning is crucial to the success of a team effort as it ensures that:**

> ➢ If anything goes wrong, there is likely to be a back-up plan to support how to best manage it
>
> ➢ Everyone in the team is aware of milestones and expected targets
>
> ➢ Outcomes and objectives are outlined well in advance, to ensure that staff know what is expected from them and the team

Team members should be encouraged to get involved in the planning process, so that they are able to take accountability and ownership for their responsibilities within the team. This is also a good way to get buy-in and support from the team members.

They should also be encouraged to take responsibility for the team and each individual function they play within it.

Teams should find a concept that works for them and make everyone familiar with it. When teams can refer back to a concept, they can then all be familiar with styles or ideas behind the concept. They can therefore refer to the ideas at any given time.

**Some examples of concepts that teams could become familiar with include:**

> ➢ Myers-Briggs Type Indicator
>
> ➢ DISC
>
> ➢ Honey and Mumford – PART (Pragmatist, Activist, Reflector, Theorist)

➢ Edward Deming – PDCA Cycle

## Decision making

Edward Deming's PDCA Cycle is a repetitive process that can be utilised to determine the next action to take prior to making a decision.

This is one example of a process that can be utilised by a team to work in the decision-making process and it gives everyone in the team an opportunity to refer to the same concept. Therefore, the team members are effectively 'speaking the same language'.

**There are four steps involved in the PDCA Cycle process. They can be detailed as follows:**

**Plan**

➢ Planning ahead for change and analysing and predicting results

➢ Identifying customer expectations

➢ Identifying improvement needs

➢ Developing possible solutions

➢ Developing action plans

**Do**

➢ Executing the plan

➢ Taking small steps in controlling the plan

➢ Trialling the changes

➢ Monitoring and evaluating the plan

**Check**

➢ Checking the actual outcomes and results

➢ Comparing them with the intended outcomes

➢ Identifying quality improvements

**Act**

➢ Taking action to improve the process

➢ Developing a new plan to address improvements not already achieved

➢ Identifying further opportunities for improvement

The next thing a manager needs to do is to encourage staff to take responsibility for their own actions within the team environment. They should also be working with other team members to support them in their work and helping others when feasible and necessary.

An effective and high performance team will work well together, get the work done, be efficient and will understand the value in working as part of a team versus working alone.

All team members should always be encouraged to participate in the decision-making process.

The more they are encouraged to participate in a process, the more likely they will be to take ownership and assume a level of accountability towards helping to drive the success of the process.

**A good model to use with staff is noted below:**

| Above the line behaviour | Accountability<br>Responsibility<br>Ownership |
|---|---|
| Below the line behaviour | Excuses<br>Denial<br>Blaming others |

Encourage team members to operate from 'above the line' by taking accountability for their actions, assuming responsibility towards the decision-making processes that the organisation has in place and by taking ownership of their job roles and the consequences of their decisions.

This is how effective teams work.

Team members that are displaying 'below the line' behaviour are usually lacking confidence or not feeling part of the team environment.

A good manager should empower team members to take responsibility for their actions and decisions, expecting them to operate from 'above the line' at all times.

Organisational culture will impact the way in which team members interact with each other, management, external clients and customers. Teams will usually have their own set of behaviours and interactions – these need to be in line with the organisational goals, so that the objectives of the company are being met and achieved.

As teams are usually an integral part of any organisation, the organisation itself should be aware that its culture could impact the morale of the team itself.

Teams need to have a clear and succinct focus on their objectives.

**Some of these areas of focus include:**

- ➢ Having a clear target

- ➢ Knowing their purpose within the organisation

- ➢ Measured Key Performance Indicators or Key Result Areas

- ➢ A specific plan

- ➢ A decision-making process

- ➢ Being focused on customers – both internal and external

Once the team has been able to identify and establish their areas of focus, they can then set the responsibilities of each member within teams (in terms of working towards the achievement of the team goals).

Effective managers will always be looking for ways to improve their team. They can implement continuous improvement practices; work with integrity; ensure they have open and honest communication; that they solve problems as soon as they arise.

Teams should also be empowered to perform better by encouraging them to have a purpose.

This could be set as the first team activity. It is like a Mission Statement for the team itself. It should be a short statement that is worked on and agreed to by the entire team. Once it has been set, the team should refer to it often by putting the purpose up on posters, sending emails, referring to it during meetings etc.

Having a team purpose can be a positive and empowering structure for a team. It can improve and enhance performance, as team members will have a common purpose and goals. They will usually be motivated and encouraged by having a purpose to refer back to.

# Team plan

| Date: | Objectives: |
|---|---|
| **Team members:** | |
| **Roles within the team:** | |
| **Milestones:** | **How can we ensure the plan is achieved?** |
| **Date:** | **Sign off:** |

## 2.3 – Provide feedback to team members to encourage, value and reward individual and team efforts and contributions

Most staff members do not receive feedback – ever.

Sometimes, managers make their team members feel as though they are receiving feedback as a disciplinary measure.

**Managers need to be able to give feedback in a manner that is:**

- ➢ **Outcome-orientated:** Team members need to know whether the task was achieved

- ➢ **Process-orientated:** Team members need to know the way the task was achieved

Once team members are informed of the changes to processes, systems and procedures – or even as a general rule during the course of their employment – it is imperative to provide them with feedback on how they are performing their job roles. This ensures they are involved and are able to take accountability for their actions and the organisation's progression.

An effective manager provides feedback to staff and team members in an effective manner that encourages the team member to perform better.

**Feedback can be given in any of the following ways:**

- ➢ During formal meetings

- ➢ During ad hoc meetings

- ➢ Informally

- ➢ During performance reviews

- ➢ During annual salary reviews

Team members, management and administrative staff need to feel valued and their ideas validated during the feedback process. Feedback should always be considered two-way, whereby the manager gives feedback to a team member, and they feel offer it back to their manager. This can be relating to their management style, the organisation and how efficient processes and policies are.

An effective manager asks for feedback then validates and utilises it to ensure the organisation is improving their processes at all times.

If a team member contributes with feedback that is not taken seriously, they may be hesitant to provide feedback in the future.

**When communicating and getting feedback from others in the workplace, it is a good idea to remember to:**

- ➢ Discuss the facts

- ➢ Not make anything personal

- ➢ Follow protocol as per the organisational culture

➢ Not assume that feedback has been received via email etc. until you have proof

➢ Be overly cautious if you feel that feedback could be misunderstood

➢ Discuss what type of feedback is required and source as appropriate

Often, organisations will ask for feedback from team members, clients or prospects and then not utilise it.

*Feedback should be looked at as an opportunity to improve.*

There are a number of ways to encourage staff when providing feedback and opinions on processes and procedures.

**Some of these could include:**

➢ Provide a reward system for staff that work well and do their jobs consistently

➢ Providing rewards for staff who find ways for the organisation to save money or contribute to effective workplace initiatives

➢ Promoting staff when they have shown a genuine interest and ability to implement new systems that improve workplace practices

Feedback by managers should always be given as soon as possible and be clear and concise, so that the team member knows exactly why they are being given it.

A manager should provide feedback to team members on a regular basis and can provide feedback specific to the manner in which they are undertaking their job role. It is a good measure to ensure staff are on task and are working towards the organisational objectives, while providing an avenue for team members to improve their knowledge and skills as required.

Effective managers know how to give specific feedback. Managers should attempt to provide accurate and concise feedback to team members, so that they are aware of which aspect of their job role they are performing correctly and which ones need further attention.

*For example, "Jared, you did really well by providing the report on time yesterday. The information you provided was precise and exactly what I needed to present to management."*

This feedback is more concise and accurate and can provide more benefit to the learner than just

*"Great report, thanks Jared".*

The team member should be encouraged to work well, told what they did right, or what they need to improve on.

When providing feedback on something that requires further attention, a manager should always acknowledge what the team member has done correctly and then explain the behaviours that require further action.

## 2.4 – Recognise and address issues, concerns and problems identified by team members or refer to *relevant persons* as required

When a manager is responsible for a number of staff, it is often difficult to manage them all individually.

**Some of the skills that an effective manager needs in order to be able to manage staff in the most appropriate and efficient manner include:**

- ➢ Excellent communication skills

- ➢ Interpersonal skills

- ➢ Objectivity

- ➢ Time management skills

- ➢ The ability to be diplomatic, fair, reasonable, just, act out of integrity and be honest at all times

When dealing with teams, there are a number of situations that can arise that can have a negative impact on team members.

**Some of these include:**

- ➢ Staff not getting along with each other

- ➢ Conflict between team members

- ➢ Resentment from staff members

- ➢ Staff being overworked due to inefficiencies of other staff members

- ➢ Staff being overworked due to lack of resources

These issues need to be addressed and rectified immediately to avoid further conflict to take place.

Concerns should be raised by team members or management as soon as they can be raised appropriately, without detriment to other staff members.

The manager should ensure they are approachable, fair and reasonable, diplomatic and confidential when they address these issues.

There are a number of ways in which a manager can help team members to resolve problems and concerns as they arise.
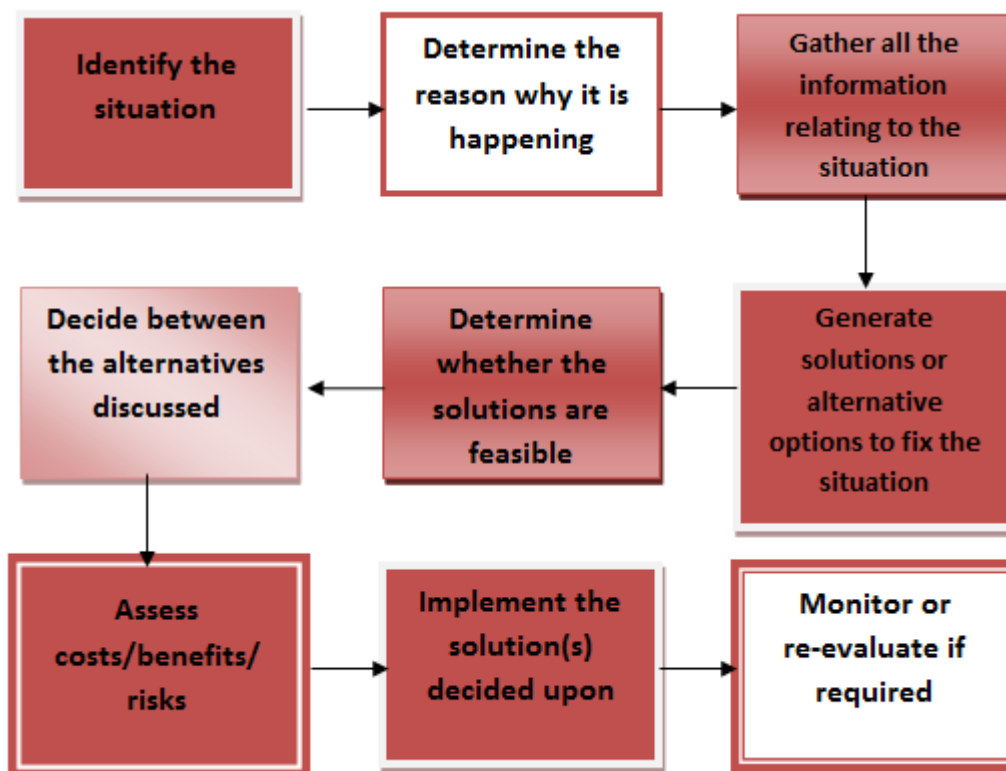
Managers should use their discretion, diplomacy, tact and reasonable judgement to rectify these situations or issues.

**Patrick Lencioni has identified the five dysfunctions of a team as follows (The Five Dysfunctions of a Team – a Leadership Fable, 2002):**

> ➢ Absence of trust

> ➢ Fear of conflict

> ➢ Lack of commitment

> ➢ Avoidance of accountability

> ➢ Inattention to results

Managers need to be aware of the dysfunctions that can happen within a team. They need to further investigate causes, then determine suitable options to solve the problems.

**They could use the following model to assist in the problem solving process:**

| Identify the situation | → | Determine the reason why it is happening | → | Gather all the information relating to the situation |
|---|---|---|---|---|
| | | | | ↓ |
| Decide between the alternatives discussed | ← | Determine whether the solutions are feasible | ← | Generate solutions or alternative options to fix the situation |
| ↓ | | | | |
| Assess costs/benefits/risks | → | Implement the solution(s) decided upon | → | Monitor or re-evaluate if required |

Managers will also need to keep track of team members, ensure they are performing their job roles correctly and working towards the organisation's objectives.

One way to do this is to work on a Performance Management Plan with the learners and incorporate the learning objectives into the plan.

A Performance Management Plan (PMP) is usually completed annually. It consists of performance objectives and development objectives which can be monitored by the staff/team member and their manager. The performance objectives can be measured by using key performance indicators. Team members are advised when they are not meeting the objectives based on a rating system.

Most PMP programs will give the staff a considerable amount of input whereby they can rate themselves first and their manager will then agree or disagree, based on their performance.

This can provide a good avenue for managers to identify and address issues and concerns as they arise, focus on improving the behaviour that is not working for the team member, and provide some guidance for the team member.

If the manager themselves is not able to address or assist in rectifying the issues, then they can refer to the relevant internal staff for further action or organise a referral to the relevant external consultants for further action.

**Internal staff that may be able to assist include:**

➢ HR managers

➢ Peers

➢ Colleagues

➢ Other managers

➢ Coaches or mentors

**External consultants that may be able to assist include:**

➢ Counsellors

➢ Support staff

➢ Specialist staff

➢ Industry experts

An example of a Performance Management Plan template is provided on the next few pages:

# Performance management plan

| | |
|---|---|
| **Name of employee:** | |
| **Performance period:** | |
| **Job title:** | |
| **Supervisor/manager name:** | |
| **Signed off by manager:** | |
| **Signed off by employee:** | |
| **Date:** | |

## Performance objectives

| Key Result Area: |
| --- |
| **Objective:** |
| **Milestones:**                                                   **Review date** |

<br>

| Key Result Area: |
| --- |
| **Objective:** |
| **Milestones:**                                                   **Review date** |

<br>

| Key Result Area: |
| --- |
| **Objective:** |
| **Milestones:**                                                   **Review date** |

<br>

| Key Result Area: |
| --- |
| **Objective:** |
| **Milestones:**                                                   **Review date** |

## Development objectives

| Development objective: | |
| --- | --- |

| Measurement: | Date due: |
| --- | --- |

| Development objective: | |
| --- | --- |

| Measurement: | Date due: |
| --- | --- |

| Development objective: | |
| --- | --- |

| Measurement: | Date due: |
| --- | --- |

## 2.5 – Model expected behaviours and approaches

**Expected behaviours and approaches**

It's all very well instructing team members to behave in a certain way and approach tasks in a particular manner; however, if you do not practise what you preach, it is unlikely that others will take note of your instructions.

Do not expect team members to be courteous to you if all you do is shout at them and speak in a derogatory manner – respect needs to be mutual in order to exist.

Therefore, you will need to model the behaviours you expect from colleagues.

**Expected behaviours may include:**

> ➢ Being courteous
>
> ➢ Being punctual
>
> ➢ Wearing correct uniform
>
> ➢ Using appropriate language
>
> ➢ Meeting deadlines
>
> ➢ Sharing ideas.

If you are a model team member, then the others will have no excuse not to meet the standards you set – it also minimises resentment, as it shows that you do not consider yourself to have a different set of rules from the others. This means that team members will be more willing to work for you and ultimately produces a better set of results.

A good way to determine what the expected behaviours and approaches of your workplace is to create a code of conduct that details all of these – this should be made universally available and should be easy to understand. All team members should read this through to get an idea of what is expected of them in terms of behaviour and the way they approach certain tasks and problems.

# 3. Participate in and facilitate work team

## 3.1 – Actively encourage team members to participate in and take responsibility for team activities and communication processes

## 3.2 – Give the team support to identify and resolve problems which impede its performance

Managers need to take responsibility for their own actions. They should be accountable for what they do and accept ownership of their job roles, duties and interactions with other staff, team members and clients or prospects.

As a result of this, managers who lead by example will ensure team members take responsibility for their actions and how they behave in the workplace.

Teams need to be able to continuously grow, evolve and improve themselves within the organisational culture.

They should be constantly striving for continuous improvement practices and understand the best way to work together to achieve the desired objectives.

Teams should work cohesively and effectively. A good manager knows and understands the value in a team working well together and will do whatever they can do to make sure they achieve this.

A positive team culture should be encouraged by management, to make sure the team is always evaluating its performance, abilities and how they can best be apply themselves to the objectives and goals of the organisation.

Team members and managers who value and understand diversity, differences, co-operation and the ability for team members to respect each other and work together will always be most successful in the working world.

Diversity within teams can be used to the advantage of the team. If there is a culture of respect, appreciation, admiration and honesty within a team, then its diversity will be valued, understood and utilised to its benefit.

Within each team, members will have different strengths, opinions, knowledge and values. A good manager will tap into these qualities and utilise them to their advantage.

Managers who don't allocate work or functions within the team to utilise these strengths and skills will find that the members will soon become defensive, unmotivated and unwilling to work or add value to the team.

There are a number of signs that can indicate if there are issues that need resolution within a team.

**Some of these were discussed earlier, and others include:**

- ➢ Resentment from team members

- ➢ Bickering among team members

- ➢ Team members being overworked

- ➢ Lack of resources can add to stress

- ➢ Team members not treating each other with respect

- ➢ Lack of trust

A team that is not working well needs intervention from their manager or an independent third party – such as HR, the CEO, an outside consultant or other support staff – to help them to achieve the goals set by the organisation and ensure they are working efficiently.

Managers need to identify and recognise how the team is functioning, what could be going wrong, where the issues lie and provide an opportunity to support the team. They also need to resolve the problem and stop it from happening again.

There may be a need for further training, team-building activities or more communication to get the team working together.

The communication process is an important avenue to ensure that team members are working well and identifying the best way to resolve issues or problems.

How a team communicates will be dependent on a number of factors.

**These include:**

> ➢ The company culture
>
> ➢ The manager and how they have encouraged communication to take place
>
> ➢ Where the team is located (i.e. Are they all on site? Are they all over the world/country? Do they work remotely? Etc.)
>
> ➢ How many members there are in the team
>
> ➢ How open the team members are to receiving communication

## 3.3 – Ensure own contribution to work team serves as a role model for others and enhances the organisation's image within the work team, the organisation and with clients/customers

An effective manager knows how to work well – they know how to manage people; they know how to get the job done; they know how to help their team to reach its full potential; they understand that communication is the key to an effective relationship.

Transparency is paramount in the team environment – everyone needs to trust each other and respect is essential.

**Great managers demonstrate many of the following qualities:**

> ➢ Diplomacy, tact and discretion
>
> ➢ Ability to treat matters with confidentiality
>
> ➢ Fairness
>
> ➢ Respect and empathy
>
> ➢ Integrity and honesty
>
> ➢ Ethical and professional know how

Good managers demonstrate their ability to encourage integrity at all times – they understand it is one of the key aspects of being a great leader.

Efficient managers understand the importance of working with others – they know that seeing things from another person's perspective is important in the business world. They know that everyone has a situation or a story they may be dealing with: at home, in their personal life, or in their career.

They recognise when they need to be empathetic or when they need to be fair and just.

# 4. Liaise with management

## 4.1 – Maintain open communication with line manager/management at all times

## 4.2 – Communicate information from line manager/management to the team

Communication with your immediate manager should at all times be open, clear, succinct and regular. Managers should also ensure they are communicating with their staff in a clear and open manner.

There are a number of things that can and do go wrong when communication is not open between management and team members.

Dr Stephen Covey, an influential management guru, has identified in his well-known book from 1990, that there are seven habits that relate to highly effective people.

A quick summary of these habits is listed below.

### Stephen Covey's Seven Habits of Highly Effective People® 1990

**Habit 1 – Be proactive®**

*This is the ability to control one's environment, rather than have it control you, as is so often the case. Self-determination, choice, and the power to decide response to stimulus, conditions and circumstances*

**Habit 2 – Begin with the end in mind®**

*Covey calls this the habit of personal leadership – leading oneself, that is, towards what you consider your aims. By developing the habit of concentrating on relevant activities you will build a platform to avoid distractions and become more productive and successful.*

**Habit 3 – Put first things first®**

*Covey calls this the habit of personal management. This is about organising and implementing activities in line with the aims established in habit 2. Covey says that habit 2 is the first, or mental creation; habit 3 is the second, or physical creation.*

**Habit 4 – Think win-win®**

*Covey calls this the habit of interpersonal leadership, necessary because achievements are largely dependent on co-operative efforts with others. He says that win-win is based on the assumption that there is plenty for everyone, and that success follows a co-operative approach more naturally than the confrontation of win-or-lose.*

**Habit 5 – Seek first to understand and then to be understood®**

*One of the great maxims of the modern age. This is Covey's habit of communication, and it's extremely powerful. Covey helps to explain this in his simple analogy 'diagnose before you prescribe'. Simple and effective, and essential for developing and maintaining positive relationships in all aspects of life.*

**Habit 6 – Synergize®**

*Covey says this is the habit of creative co-operation – the principle that the whole is greater than the sum of its parts, which implicitly lays down the challenge to see the good and potential in the other person's contribution.*

**Habit 7 – Sharpen the saw®**

*This is the habit of self-renewal, says Covey, and it necessarily surrounds all the other habits, enabling and encouraging them to happen and grow. Covey interprets the self into four parts: the spiritual, mental, physical and the social/emotional, which all need feeding and developing.*

*Source: www.businessballs.com*

These habits form just some of the many habits a good manager should have when communicating with their team.

Communication needs to be defined and understood.

The way we communicate with the outside world is what makes us or break us in the working world. An effective manager will communicate appropriately and have the interpersonal skills to manage a highly effective team that performs and exceeds expectations.

Communication works in all directions. Team members need to be able to communicate effectively with their manager also, so that the goals of the team are being enforced at all times.

**Dr Stephen Covey also developed a model that depicts the relationship between trust and co-operation in communication that indicates the following:**

Low trust / low co-operation                    High trust / high co-operation

| **Defensive –** | **Respectful -** | **Synergistic –** |
| **win – lose/** | **compromise** | |
| **lose – win** | | **Win – win** |

Stephen Covey indicates that teams within organisations should communicate using synergy so that everyone wins.

**Some of the key points of communicating effectively include:**

> ➢ Being open and honest at all times
>
> ➢ Dealing with issues, problems or situations as soon as they arise
>
> ➢ Being transparent
>
> ➢ Showing respect for everyone within the team
>
> ➢ Understanding differences
>
> ➢ Showing trust within the team
>
> ➢ Sharing information

Trust and open communication usually stem from the top down, and how a manager displays honesty and communication will usually dictate how the rest of the team respond to each other.

Managers need to lead by example.

Team members should be regularly updated on their progress. This means that managers and supervisors need to have regular meetings with their team. They should be fully aware of goals, milestones, issues and problems that have arisen and should be guided and supported throughout the process.

**Management and supervisors can achieve this level of communication in the any of the following ways:**

> ➢ Holding regular meetings
>
> ➢ Team presentations
>
> ➢ Informal updates
>
> ➢ Written reports on progress
>
> ➢ Sales quotas

**When providing feedback or communicating with team members, everyone should keep the following in mind:**

<u>**Stick to the facts**</u>

Don't ever make it personal or attack another person – the facts speak for themselves. Focus on goals and issues that relate directly back to the team and its objectives.

<u>**Remain focussed on what is being said**</u>

Communication should be linked directly back to the performance of the team. Managers and team members are often very busy – so, by ensuring communication is focussed on what needs to be addressed and said, the chances of wasting time are minimised. It also allows an opportunity to rectify a situation in a professional manner.
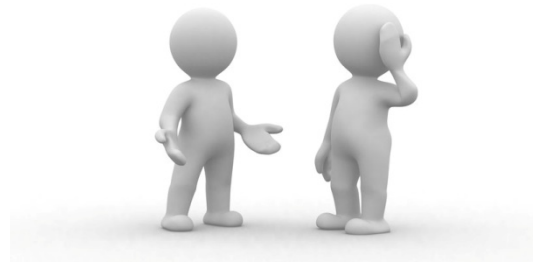
<u>**Communication should be regular**</u>

The more often feedback or communication is addressed, the better it will be for all team members involved. Regular communication means that team members feel they are being kept in the loop, understand what is going on, and feel valued, as they are receiving updates on a regular basis. This is better than finding out when it is too late or something has already happened.

Managers should always be approachable, able to give feedback and comments and able to accept feedback and comments from their staff. They should provide acknowledgement, validation and support to their team at all times.

There may also be times when they need to communicate change to their team, which sometimes is not always positive. In these situations, managers need to display integrity, honesty and empathy.

It can be difficult and daunting to have to communicate negative news or that of restructure or change to team members. When this situation arises, managers need to explain: why the change is happening; how it will affect the team members; how they expect the change will make things better; and what role the team members will be playing in the change.

Overall, people tend to dislike change and are creatures of habit. However, change within an organisation can be positive as it can help a company to grow and move forward.

Team members who are not notified of change immediately will begin to gossip and worry. Change should be communicated immediately, to avoid feelings of resentment and concern. These feelings will create a negative environment that sometimes can be even more detrimental to the team or organisation as a whole.

Managers should have strategies in place to deal with team members who are worried or reacting badly to the change.

**These strategies could include:**

➢ Referral to counselling services if required

➢ Referral to HR or other internal departments that can help

➢ Opportunity to discuss concerns and raise issues in an open table situation

➢ Other means to help staff

## 4.3 – Communicate unresolved issues, concerns and problems raised by the team/team members to line manager/management and ensure follow-up action is taken

## 4.4 – Communicate unresolved issues, concerns and problems related to the team/team members raised by line managers/management to the team and ensure follow-up to action is taken

There are a number of unresolved issues that can be present within any team environment.

**Some of these issues include, but are not limited to:**

➢ Lack of resources to get the job done

➢ Lack of proper training on equipment

➢ Bullying or harassment

➢ Staff that are not recognised or rewarded for their efforts

➢ Workplace hazards

➢ Lack of training of staff in their job roles

➢ Resentment from other staff

➢ Conflict among staff

➢ Gossip and lack of trust

➢ Staff or team members being late, not doing their jobs properly or not having interest in their jobs or the team goals or objectives

**The manner in which a manager deals with these issues will depend in large part on the following:**

➢ The level of experience of the manager

➢ Knowledge of the subject or issue

➢ Knowledge of conflict resolution techniques

➢ Confidence of the manager in dealing with these situations

Managers should always follow up with any issues that arise. Team members are also responsible, in part, for the follow up of any issues or concerns they have raised within the team.

An effective and high performing team is one where all team members are given an opportunity to take ownership and responsibility for their part in the team. A good manager will allow team members to make decisions based on their job role and understand the importance of providing team members, with the chance to show accountability for this.

Managers should also be communicating positive situations with their team members – when someone has done well they should be commended for it; when the team is performing well, they should be told and given feedback.

Team members could receive feedback based on the Performance Management Plan or annual review as discussed earlier. These usually relate to the Key Performance Indicators or Key Result Areas. When written properly, a Performance Management Plan will remove any ambiguity in terms of whether or not a team member is achieving the goals set out by both the team and the organisation itself.

Regardless of the type of feedback or communication being provided by a manager, they should always remain positive and objective in the way in which this feedback is provided.

Managers need to stick to the facts, provide feedback that is accurate and clear, and show team members that they are genuinely interested in them and their achievement of the goals of the team. They need to be honest and open in their communication.

Managers that are perceived as professional, objective, open and honest will be respected within the team environment. Staff will share their own experiences and communicate effectively with a manager that displays integrity and transparency.

Managers need to be approachable and follow through on what they say they will do, act in a responsible manner and demonstrate loyalty and commitment to their team.

Performance concerns need to be addressed immediately.

Managers and team members need to address these issues as soon as possible and in a non-threatening manner. They should be addressed in private and discussed in a clear and concise manner, leaving out any personal issues or concerns. Behaviour should be addressed and discussed, with a view as to how to best manage the situation; a solution also needs to be presented.