

## Chapter Three

### Share Team Roles

The next time you go to your team meeting, take a few moments to observe the team functions and roles. At any particular moment, someone is leading, taking notes, keeping on-track and on time, as well as participating in the meeting. Watch closely who is performing each function.

The team leader may be working very hard at *all* of these functions — not only leading the meeting, but keeping notes on a yellow legal pad, steering the agenda and the timetable, and answering questions without a whole lot of participation.

This chapter will encourage you to “share the wealth.” Stop working too hard, and let other team members take responsibility for team functioning and success.





## Share Team Roles

If your team leader is “sharing the wealth,” you may see many team members performing some basic team roles:

**Leader** sets guidelines, helps to establish goals and leads specific parts of the meeting.

**Recorder** keeps the visual memory of the team, capturing the nuggets of information so that all can see and follow the team’s progress. At the minimum, the recorder captures key subjects and main points raised, decisions made and items that the group has agreed to raise again later.

**Facilitator** guides the team process — helping the team understand the issues, reach agreements and plan next steps. The facilitator keeps the meeting on the topic and focused by opening and closing discussions, managing participation, providing process tools and techniques, checking for decisions and intervening when necessary.

**Timekeeper** keeps time as established in the agenda and ensures that the meeting does not run overtime on any particular subject. The timekeeper provides warnings when time is running out.

**Team Members** contribute to the team, share their knowledge and expertise, participate in all meetings and discussions, and carry out their assignments between meetings.

In an extraordinary team, team members freely volunteer and often informally assume these basic team roles to ensure effective team functioning. The sharing of these roles and functions encourages team involvement and participation.

If you see only one or two people taking care of all the team functions, you may want to introduce this

concept of sharing team roles. Suggest that different team members volunteer for each of the roles. Be clear about the definitions of each role and then conduct your team meeting.

At the end of the meeting, take a few minutes to check the process. Ask: “Did the roles help the team?” and “What could we do differently?” Reinforce what went well, and improve on the “do differently” at the next team meeting.

## The Team Leader

The team leader is the most pivotal role on the team. The leader sets the tone and expectations for how a diverse group of people will work together to achieve specific results.



The team philosophy may be new to some team leaders and members. They will instinctively continue to work independently and look to the leader for specific task direction. To build productive teams, team leaders must direct, guide, facilitate, and coach.

Leading teams means making tough decisions to obtain the appropriate level of involvement, calling upon the experience and expertise of each team member. Strategies vary according to the maturity of the team — spending more time directing at first, and then developing and evolving to the point where the team can handle more and new responsibilities and work *interdependently*. As you build your team:

**Tell 'Em Everything.** As you set the team up for success, clarify expectations, guidelines, deliverables and deadlines. Be willing to state what you know — *and* what you don't know. The team needs to have the same information you have in order to build trust and work together.

**Be a Coach.** The successful team leader coaches the team so it can be more involved in preparing and planning the work, knowing what work is being done, and setting high performance goals. Of course, this means that you may need to bone up on coaching and team dynamics. Find a great team facilitator to train and coach you!

**Watch Process as Well as Content.** Be concerned not only with what the team does, but how

the team goes about its business. You can't achieve great results over the long term without also focusing on what is happening to and between team members.

**Share the Wealth.** Traditionally, the team leader "leads" the team (and does most of the talking), records what's being said on a yellow legal pad, and keeps time (or forgets to watch the time and everyone is stuck for an extra two hours....). Why not share the wealth? Ask for different team members to be the recorder, timekeeper or even "lead" different parts of the meeting.

**Don't Hog Airtime.** Watch how much "airtime" you use. Do you dominate the discussion? Are you the first or last to speak? Do you offer your opinion? Ask for advice? Ask others for their ideas?

**Be Part of the Team.** You put your pants on just like everyone else. You are no better nor worse than your team members. So check the ego at the door and look forward to doing great work with great people.

**Aim for Consensus.** The most common concern I hear from team leaders is the fear that the team will march off in a direction the leader thinks is unwise or inappropriate. When the team aims for consensus, *that will never happen*. Think about it. Consensus means that all can live with and support the decision upon implementation. If you, as a team member, can't live with it, then you don't have a consensus!

**Have a Fallback.** If the team gets jammed, and can't reach a consensus (or they possibly could, but will talk longer than you have time for), then "fall back" to a previously identified position. For example, many teams declare "We will aim for consensus, but in the event we cannot reach a consensus within this meeting, we will fall back to 'the team leader decides'." Someone has to break the "tie." In this case the team leader calls it. Or you can fall back to a majority vote.

## Select Your Team Leader

The team leader is the primary point of contact between the team and other parts of the organization. The team leader acts as the spokesperson to higher levels of management and resolves conflicts between supervisors and managers.



**Management** typically appoints the team leader if the team is just forming and members don't know each other well. In a few cases, management doesn't yet have a high degree of trust in the team's decision-making process and therefore finds it necessary to appoint a leader at the onset. They typically appoint the process expert or senior member to lead and represent the team at management briefings.

Management must choose an individual who has demonstrated facilitative leadership skills, or they should be prepared to train the prospective team leader. The team leader should be well-respected by the team and other stakeholders, be technically competent and have the best interests of the team and the overall organization in mind. Some organizations use an assessment instrument or a simulation to

forecast how well the potential team leader will interact.

**The Team** may decide who the team leader is going to be. Typically, teams select the obvious “leader,” (most senior, most knowledgeable, most outgoing etc.), but for management to be truly comfortable with the team decision, the team should decide its leadership based on specific criteria as mentioned above. In this way, management will feel more comfortable and confident with the team’s decision.

It is not unusual for an informal leader to emerge mid-way through the team development process. The informal leader usually complements the formal leader’s spokesperson role by ensuring open and clear communication, cooperative relationships and effective decision-making.

**Rotating Team Leaders** volunteer or are assigned the leadership role for a specific task and within a specific length of time. This ensures balanced participation and allows team members to learn new leadership skills and sharpen their team skills.

Set some ground rules on how the role will rotate:

- Will everyone rotate into leader role?
- For how long?
- Will any additional training be needed?
- Will responsibilities change depending on the leader’s knowledge, skills, and abilities?
- For self-directed teams, will there be additional compensation?

All teams need a team leader to focus the efforts, set guidelines, and deliver results. How you go about selecting your team leader depends largely on the mission, management, organizational culture and development of your team.

## Recorder Captures Key Information

Want your teams to stay focused? Capture and post key information on the wall — on flipchart paper, whiteboard or the blackboard. Your team members will stay focused and on track as well as remember and act on the information well after the meeting.



Some kinds of information you might post include:

**Meeting Purpose.** The mission, goal or objective of the meeting.

**Agenda.** The chronological sequence of events or list of items to be discussed in the meeting. Include who will lead the discussion and the timeframes.

**Ground Rules.** Agreed on team norms that guide the effective functioning of the team (e.g. honor time limits, don't interrupt...).

**Team Map.** This could be a timeline, schedule, flow of events, project plan or process map.

**Parking Lot.** Make stickie notes available to your team members to “park” items that need to be discussed or done in the future or a comment to the group without taking up valuable airtime.

**Action Plans.** All teams should have an action plan chart where tasks and deadlines are noted and assigned.

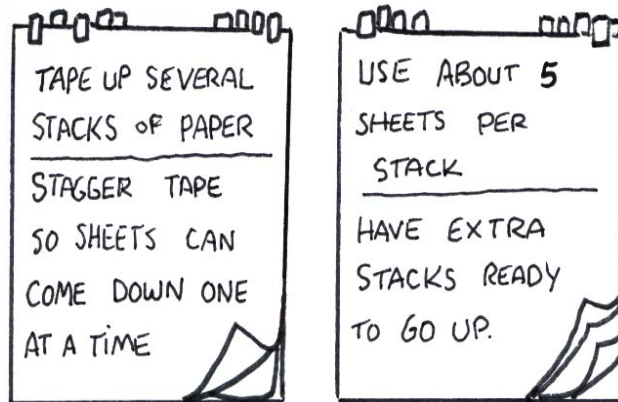
Capture information while the team is talking to ensure understanding and clarity of what has been said. For instance, if an issue was broken down into

four parts, capture those four parts on an overhead transparency (more than 15 people) or a flipchart (fewer than 20 people) or on a blackboard (small classroom). This serves as a reminder of what has already been said and agreed upon.

### Easel on the V all

Leave your easel behind and create an easel on the wall! Take your easel pad and place a piece of tape on each of the bottom outside edges. Lift up the sheet of easel paper. On the second sheet, place a piece of tape on the bottom edge, just inside of where you place the tape on the top sheet. Continue to place the tape so five sheets of paper can come down off the wall one at a time.

Take all five sheets in hand and rip the sheets off the easel pad, all at one time. As a nice, neat stack, tape your "pad" on the wall!



Tape up several stacks of paper, depending on how much wall space you have. Or have extra stacks ready to go up when you need them.

## Fantastic Flipcharts

Recording ideas, key points, agreements, decisions, and action items is a great way to keep your team focused and on track. When using flipcharts:

**Write in Large Capital Letters.** Use the thick part of the flipchart marker. Leave a margin on both sides of the chart.

**Capture Key Words** the speaker uses. Abbreviate where possible. If you miss a point or don't understand, ask for the speaker to repeat or clarify what was said. If in doubt, check with the team members to see if you captured the idea correctly. If you aren't sure how to spell a word, ask for help. Or have a ground rule that misspelling is okay.

**Let Everybody See.** Stand to the side of the easel when not writing. The point is to capture ideas so team members can use their combined thoughts to move forward. Post charts on the wall with masking tape or low-tack tape.

**Use Color.** Alternate between two colors with each new point. Use dark colors such as black, brown, blue, dark green, or purple to record the team's ideas. Highlight key points with orange, yellow or pastels. Keep in mind that some people might be color-blind!

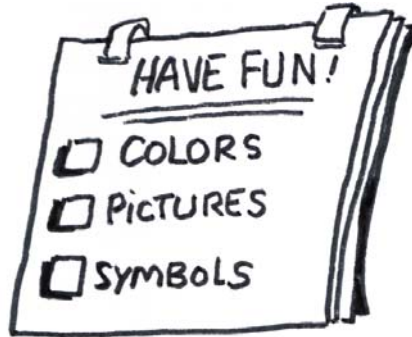
**Be Bold.** Emphasize titles with underlines, clouds or pictures. When listing items, bulletize with circles, diamonds, boxes or arrows, not with numbers. Number each page and post on the wall so all can see.

**Have Tape Ready.** Before the meeting begins, stage extra pieces of masking tape on the easel or edge of table so that you can quickly post the flipchart paper. Place the tape vertically on the top, about one inch from each side rather than at a corner angle. This will

allow for easy removal. If posting on expensive wallpaper, use a high quality drafting tape.

When you take down the paper, turn the tape over onto the back of the paper — this will keep the tape from sticking to other sheets.

Be creative and have fun recording your teamwork! Use colors, pictures, and symbols to express your team's thoughts and energy. If you don't consider yourself to be artistic, try using "wingdings" or trace a picture from clipart or a coloring book.



At the end of your meeting, agree on what information needs to be saved, and in what format. Some teams simply roll up the flipcharts and post them right before the next meeting. In this way, they are ready to start where they left off. Other teams like to type up the key points and action items as "meeting minutes" and distribute them shortly after the meeting. Still others have electronic copyboards which immediately reduce the flipchart into letter-size paper which is handed out as the team members leave the room.

## Effective Facilitation

The facilitator is a formal role with the primary responsibility of guiding the team toward its goal. A facilitator focuses on the process (the “how to”) rather than the content (the “what” the team is addressing). While there are plenty of content experts on the team, it is the facilitator’s job to make sure they get to where they need to go as efficiently and effectively as possible.

As a facilitator, some of the key activities you need be involved in are:

**Clarify the Charter.** Get together with the sponsor and team leader and make sure you (and they) understand the team’s goal(s) and expectations, the composition of the team, timeframes, deliverables, capabilities, and constraints.

**Partner with the Team Leader.** Before the team ever meets, get together with the team leader and agree on the basic strategies to move the team forward. Some team leaders will need lots of support and coaching from you. Others will have a good sense for how to proceed. Regardless, you must meet with the team leader to ensure you are on the same sheet of music. Agree on how you will prepare for and critique each meeting. Develop an initial agenda for the team to follow. Agree on a “cue” to signal to each other when you should adjust the strategy or take a break to confer.

**Keep on Track.** As the process expert, you provide structure and process tools to help the team achieve its goal. At the beginning of each meeting, ensure the team agrees to the agenda and time limits. Keep the meeting on the topic and moving along.

**Intervene when Necessary.** When the team gets off track or if the discussion fragments into multiple conversations, you must step in to bring the team back on topic.

**Manage Participation.** Open discussions and invite participation. Tactfully prevent anyone from being overlooked or dominating the discussion. Summarize and close discussions.

**Check Decisions.** Teams make small decisions throughout the meeting. When you sense a decision has been made, check for understanding and agreement. Make sure the team understands the next steps and who will do them.

**Develop the Team.** Your secondary goal is to enable the team to function effectively without you. This means that you are constantly training, coaching and developing the team leader and team members. Initially, you may be very active and involved in all aspects of the team's work. As the team matures, many of your responsibilities will be assumed by other team members. In a high-performing team, the facilitator role is shared among team members, and a designated facilitator may no longer be required.

If you prepare correctly, most of your work will be done in the planning, preparation and debriefing of the meeting. The actual "facilitating" of the meeting becomes a small part of your involvement. A long-term measure of your success is that you are not required to intervene during the team meeting. The team facilitates itself.

## Terrific Timekeeper

The team should agree on how it will manage its time during the meeting. The timekeeper keeps time as established in the agenda and ensures that the meeting does not run overtime on any particular subject. The timekeeper provides warnings when time is running out.



The timekeeper should provide warnings as time is running out. For instance, if twenty minutes is allocated to discussion of a particular topic, the timekeeper might warn the group at the ten minute mark, the five minute mark, the one minute mark and then signal the group when time is up.

When the time is up, the team may decide to:

**Continue.** Renegotiate the timetable and continue the discussion. (Remember, meetings start and end on time).

**Close.** Move toward immediate closure of the discussion.

**Park It.** Save the issue for another meeting.



*Team members enjoy working together*

## **Team Members are Team Players**

The best team players constantly share the spotlight, making sure everyone has the opportunity to shine. They pay attention to others before focusing on themselves. They offer help without being asked. They do things because they need to be done, even if it isn't their "job."

In my experience, these kinds of teams are truly extraordinary. They enjoy working together to achieve success. There is an atmosphere of mutual respect and consideration of others.

This type of teamwork doesn't happen overnight. It starts with a few people setting the standard and the ground rules for team cooperation. Over time, other team members adopt these behavioral norms until they become second nature for the team.

Try these techniques to build an extraordinarily cohesive team:

**Praise Works Wonders.** Look for the good in each team member and recognize his or her contributions to the team. Compliment their efforts, achievements and good qualities. Recognize the simple things they do, such as being on time, completing assignments and other tasks that may be considered "just part of the job."

**Be a Cheerleader.** Constantly encourage others to do their best work. Support them through the good and not-so-great times. Even when they don't succeed, note that they tried their best. When ready, help them try again.

**Be Considerate.** Think of the Golden Rule: Do unto others as you would have them do unto you. You can see this principle in action in the little things they do: asking others for their opinions, being attentive,

actively listening, validating what others have said, not interrupting or having side conversations.

**Focus on Others First.** Truly care about others and how you can help them be successful. You'll be amazed that what goes around, comes around.

**Think Win/Win.** You have to believe that there are enough "wins" to go around. If you think there are enough wins, you don't have to compete with your fellow team members! By working together, everybody succeeds.

**Share the Glory.** When the team achieves a critical milestone or goal, give credit to each team member. Recognize that one person couldn't have accomplished the task alone, and that the team is greater than the sum of its parts.

## Team Champion

Every team needs a champion or sponsor, a higher level manager (or a group of managers) with a stake in the team's performance and results. The champion acts as an advisor to the team leader, supports the team and removes roadblocks to achieving the goal. Ultimately, the champion's primary role is to ensure the team's success — not necessarily to “do” the team's work.

Champion(s) should have a stake in the outcome, the ability to influence or the authority to make changes, the ability to delegate, the clout to remove barriers *and* the courage to trust the team.

If you don't know who your champion is, go get one! Your champion was probably involved in bringing the team together, chartering the team, or selecting most of the team members. A champion is your advocate “up the food chain” and can often venture where team members dare not go.

The champion is NOT an active member of the team. There is a tendency for many champions to dig into the weeds, getting involved in the day-to-day tactics of the team. Agree up front on your roles and how you will keep your champion apprised of the team's progress.

As a champion, your team expects you to:

**Show Support.** Attend *some* (but not all) of the meetings. Know everyone's name. Be positive and enthusiastic. Talk up the importance of the team's activities and progress throughout the organization.

**Kick It Off.** Be present at the very first team meeting. Communicate your personal perspective on the importance of team success. Explain the reasons why the team is being chartered and what is at stake if

the team does or does not succeed. Clarify your expectations and describe “success.” Express your commitment to follow through on the team’s decisions and recommendations.

**Know Stuff.** Learn about the team’s progress through staff meetings, e-mails, voice-mails, and office chatter. Be the team’s eyes and ears. Alert the team if you hear anything good or bad.

**Pave the Way** politically and financially to ensure team success. Be an advocate for resources. Make sure the right connections are made for the team’s recommendations and decisions to be supported through implementation.

**Intervene** on behalf of the team. Sometimes, the team can’t speak for itself. Someone “up the food chain” must speak on its behalf. Speak with the same passion and commitment as the team.

**Recognize Performance.** At key milestones and when all is said and done, make sure the team and its members are recognized for a job well done.

## Define Roles and Responsibilities

As your team comes together, it is important to define the roles and responsibilities beyond the sharing of team roles. Most people want to know where they belong on the team — why they are there and what is expected of them. Take the time to clarify their roles. Ask team members to share their:

**Expectations.** Ask what they expect from the team and how they might be able to contribute to the team's success.

**Job Description.** Let team members describe, in their own words, what their job is, the work that they do, how they do it, who they work with and what they are responsible for.

**Action Items.** Clarify action items and responsibilities. Ensure team members have a clear understanding of what the task is, and what the team expects them to do. Agree on how the members will let the team know the task is accomplished.

**Definition of a Good Team Player.** Clarify the definition of a good team player. For example, he or she contributes meaningfully to the team, shares knowledge and expertise, participates in all meetings and discussions, and carries out assignments between meetings.

**Balance Task and Maintenance Behaviors.** Less tangible, but just as important, is the team's interaction skills. We all think we are great team players, committed to getting the job done with others. An effective team demonstrates a wide range of task and maintenance behaviors:

**Task behaviors** enable the team to work on a specific task. Some task behaviors include:

- ❑ **Initiating.** State the purpose or objective. Offer opinion and ideas. Offer facts, examples or relevant information. Suggest a procedure or method for the team to follow. Suggest resource people to contact.
- ❑ **Asking.** Ask others for their opinions and ideas. Validate others' ideas. Ask others to clarify their opinions and ideas. Bring in others who may not speak. Poll the team for a consensus.
- ❑ **Clarifying.** Clarify or explain reasons. Provide concise examples and illustrations. Point out relationships between facts and opinions. Pull ideas and suggestions together.
- ❑ **Refocusing.** Refocus the team when joking, personal stories, or irrelevant talk goes on too long. Refocus the team by redefining goals, problems, or outcomes when things become hazy or confusing.
- ❑ **Summarizing.** Summarize progress or discussions. Summarize alternatives and issues facing the team. Celebrate small successes.

**Maintenance behaviors** ensure the team is working well together. Some maintenance behaviors include:

- ❑ **Encouraging.** Accept, praise and agree with the contribution of others.
- ❑ **Harmonizing.** Smooth out differences and relieve tension between team members.
- ❑ **Reconciling.** Search for common elements in conflicts. Get others to explain differences of opinion. Admit they could be wrong. Offer a compromise.

- ❑ **Compromising.** Constructively manage areas of disagreement. Aim to resolve conflicts by admitting an error, enforcing ground rules, or meeting others halfway.
- ❑ **Gatekeeping.** Manage airtime ensuring all participate and no one dominates.
- ❑ **Observing.** Observe group process and team dynamics. Provide feedback to the group to reinforce strengths and evaluate possible areas for improvement.

These task and maintenance roles can both help *and* hinder discussion. It's important to have a balance of all of these behaviors for effective teamwork.

