

WHITEWATER



TEAMS

***High Adventure, High Performance,  
and Optimal Effectiveness in a world of  
Change, Ambiguity and Continuous Whitewater.***

# ***The Whitewater Experience***

*Stage I - Whitewater Teams*

*Presented By:*



# WELCOME

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“Whitewater” – has become synonymous with high adventure, excitement, sport and thrills. But the whitewater each of us deals with daily in our roles and responsibilities rarely creates the same thrill. Moreover we are called on to bring small groups of people together, get focused, and deal with the whitewater rather than running the river ourselves. Whitewater Teams has been designed specifically to offer a guided experience dealing with ambiguity, mixed expectations and high performance.

You and the other workshop attendees will be part of a specific team. You will navigate your way through a series of tasks and learnings as you build effective processes allowing yourself and your team to succeed. You are encouraged to try new and different things, and be open to suggestion and learning. In order to be effective, this workshop requires hard work, tenacity, and a willingness to have fun. If you put forth the effort, this will be one of the most rewarding educational experiences of your life.

The workshop facilitators have been selected and developed to assist and support you as you discover how high performance teams are built and sustained. The path will at times be difficult, but by Friday well worth it!

*“The treatment was unpleasant. It was like having one’s hair brushed vigorously the wrong way, or like having a sprained ankle flexed by that dreadful kind of masseuse who urges people to relax.*

*The king (King Arthur) gripped the arms of the chair, closed his eyes, clenched his teeth and sweated. When he opened them for the second time that evening, it was on a different world.”*

*The book of Merlyn – T.H. White*

# AGENDA and CONTENTS

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*Introduction – Tuesday 8:30 am – 9:30 am*

## THE JOURNEY

Participants and Staff

## SYSTEMS AND PROCESSES

Systems Thinking

The Shifts

Learning Approach

Whitewater Learning Cycle

Transitioning

System Accountability

Personal Learning Journals

In-House Workshops

## LEARNING

The Quest

Learning Values

Leaders and the Learning Process

*Task 1 – Tuesday - 9:30 am - 12:30 pm*

## PURPOSING PROCESSES

Revisiting and Using Mission, Vision, Values

A Purposeful System

Growth Values – Teaming Skills

*Task 2 – Tuesday - 1:30 pm - 4:30 pm*

## TECHNICAL PRODUCING PROCESSES

Identifying the Steps

Design Principles

*Task 3 – Tuesday 5:30 pm – Wednesday 8:30 am*

## CONTROL PROCESSES

Assignment Unknown

Problem Solving/Decision Making

*Task 4 – Wednesday 9:30am - 12:30 pm*

## INDIVIDUAL VITALITY

Identifying and Satisfying Individual Needs

Individual Vitality and the Four Basic Work

Perceptions

*Task 5 – Wednesday 1:30pm - 4:30 pm*

## SOCIAL & ORGANIZATIONAL I

Social Processes

Team Growth Stages

Building a Plan

Individual/Team Growth Questionnaire

Cog's Ladder

*Task 6 – Wednesday 5:30 pm - Thursday 8:30 am*

## ENVIRONMENTAL PROCESSES

Environmental Fit

Feedback Processes

Environmental Systems

*Task 7 – Thursday 8:30am - 12:30 pm*

## SOCIAL & ORGANIZATIONAL II

Understanding Managerial and Leadership

Functions

Organizational Models

*Task 8 – Thursday 12:30 pm - 4:30 pm*

## FEEDBACK PROCESSES

Team Development Grid

How to Learn from your Own Experience

Johari Window

*Task 9 – Thursday 5:30pm - Friday 9:30 am*

## SYSTEMS THEORY

Key Personal Learnings

Systems Thinking

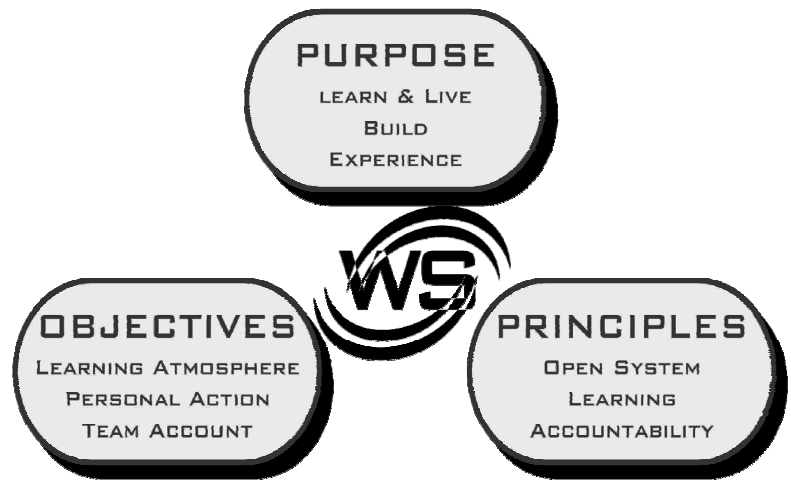
Glossary

# THE JOURNEY

This intensive four-day workshop has been designed to provide real time whitewater experiences in building and sustaining high performance as a team.

**PURPOSE** -- provide each participant the opportunity to:

- **Learn and live** the principles utilized by companies known for sustaining high levels of performance
- **Build the processes** necessary to become a high performance team
- Experience “being” a **high performance team member**



**OBJECTIVES** – through the course of the week we will:

- Create an **atmosphere for Whitewater Learning** about:
  - Teams – share models, experiences and build a team.
  - Yourself – how you – as an individual – impact, drive, influence, limit or expand the effectiveness of a group.
- Provide an **opportunity for personal action** that will:
  - Build new processes as a group
  - Create new and creative ways to share your learnings with others.
- Require individuals to **respond to and account for**:
  - Constant changes to our environment
  - Ambiguity inherently present in a world of conflicting customer and client demands.

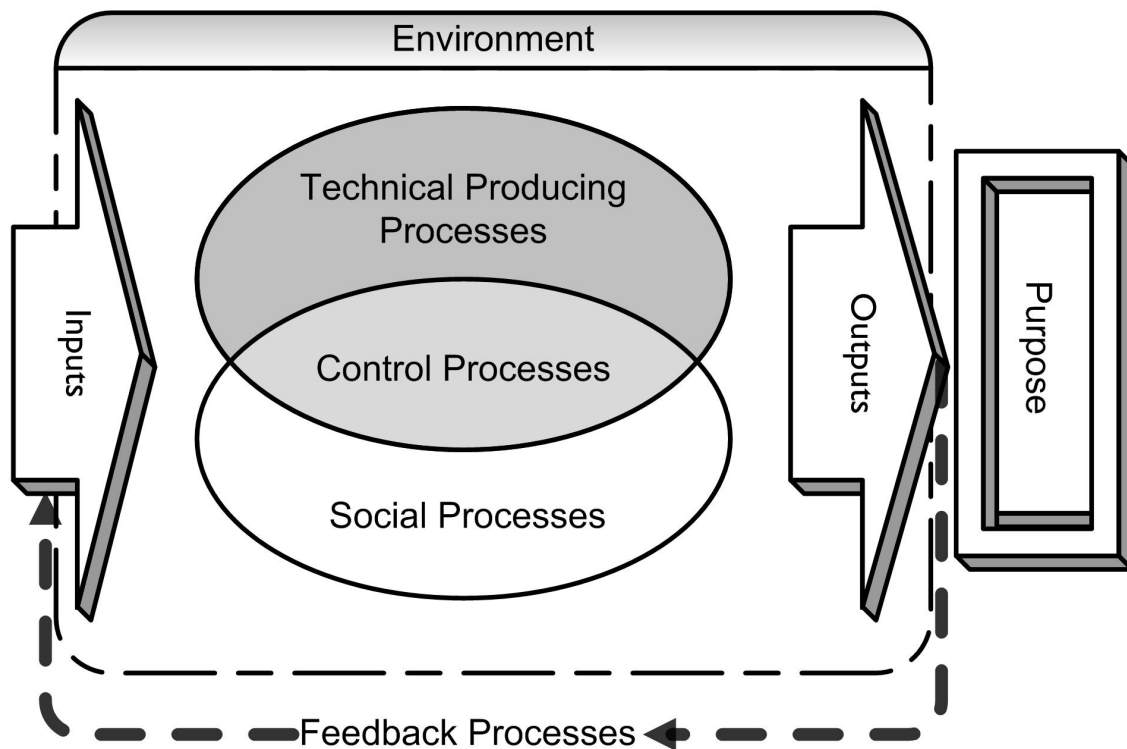
**PRINCIPLES** -- This workshop is designed to explore three key principles of high performance.

- **Open System** -- High performance organizations exist in an “open system” and build effective processes to respond to all demands of that system.
- **Learning** -- High performance organizations understand how individuals learn and create an environment which encourages learning through exploration, experience and continual improvement.
- **Accountability** -- High performance organizations account for their results to the larger system.

# SYSTEMS & PROCESSES

WhiteWater Teams emphasize Systems Thinking in their journey to becoming highly effective teams and organizations. The Open-Systems model (below) is a basic thinking framework. It is made up of several elements and sub-systems which must work together to take inputs – transform them into outputs and achieve an overriding purpose.

But seeing the elements of the systems is not enough. Individuals, teams and organizations must connect the elements and sub-systems through the construction of essential processes. Unfortunately many of these processes are never really designed at the outset – they seem to simply “emerge” or grow based on the need to do something. Effective organizations, teams and individuals work together to build processes that clearly and efficiently connect the system and make it responsive and agile to change.



This week we will focus fully on the development of essential organizational processes. These processes are categorized on the following page.

## **PURPOSING PROCESSES**

The team's sense of identity and purpose:

- Who we serve
- What they expect
- Why our team exists

## **PRODUCING PROCESSES**

The team's primary tasks and objectives for producing the work required to fulfill its purpose.

## **INDIVIDUAL VITALITY PROCESSES**

The team's process for vitalizing and growing individual team members.

## **SOCIAL & ORGANIZATIONAL PROCESSES**

Determining how members need to interact and relate to one another in pursuit of productive and individual purposes and objectives.

## **ENVIRONMENTAL PROCESSES**

How the team is going to interact with the other teams or departments for which there is internal interdependence and external demands.

## **CONTROL PROCESSES**

How the team members provide for leadership, organization, and control to insure the team's purposes and objectives are met.

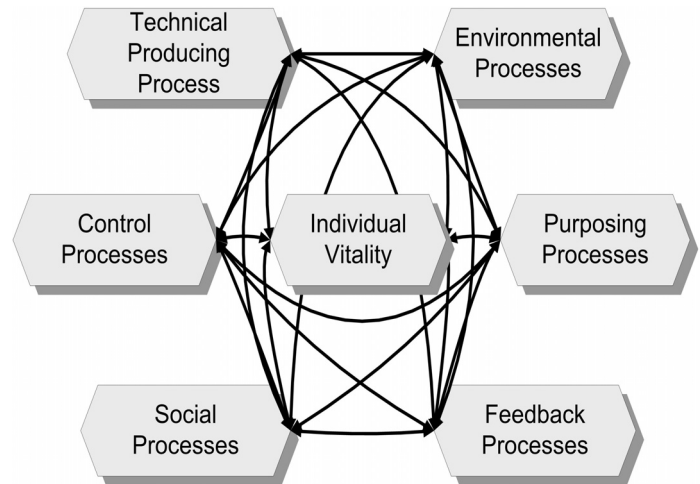
## **FEEDBACK PROCESSES**

How the team and its members make assessments and corrective adaptations or adjustments:

- with each other
- with other groups and departments
- with external stakeholders; i.e., customers

These seven process types are highly interdependent, dynamic, and have to be maintained in a reasonable balance if the team or organization is to be effective. The workshop focuses on each process and its dynamics, on the interactions between the seven processes, and ways of managing them to maximize overall systems performance.

Incorporated in the learning design are multiple opportunities for the participants to learn more about themselves, their impact on others, and the seven key processes, and to develop interpersonal skills in communications, feedback, team membership, and leadership.



# SYSTEMS THINKING

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***“All organizations are perfectly designed to get the results they get.”***

***–David Hanna***

Systems thinking requires us to let go of our current methods of viewing organizations and risk exploring new possibilities.

“An understanding of how systems work has to begin, of course, with an idea of what a system is. A system is a collection of interdependent parts which interact with each other to function as a whole. The cooling system in a car, for example, may consist of a radiator, a fan, a water pump, a thermostat, a cooling jacket, and several hoses and clamps. Together they function to keep the engine from overheating, but separately they are useless. To produce a product or service, all parts must be present and they must be arranged in the proper way.”

Early organization theory focused on pieces and not interrelated parts. Most organizations today still function as independent or closed systems, not understanding the interdependency with a large number of other systems.

Organization systems thinking recognizes and responds to the need for an appropriate relationship between the system as a whole and the larger social, economic, and other outside systems in which it operates as a living co-producing part. All systems exist as a series of agreed-on methods for doing work in the organization. These integrated agreements or sub-systems, regulate all aspects of organization life. For success, it is vital that the systemic aspects of the organization be in agreement with the broader shared cultural and environmental demands.

Within organizational systems thinking, we are primarily concerned with the following three sub-systems:

- **Social System** – The defined ways that people interact to communicate, solve problems, adjust, decide, etc.;
- **Technical System** – The method for getting the core work (product/service) accomplished to include arrangements of equipment, material, workflow processes;
- **Control System** – The standards, rules, and guidelines that direct the other sub-systems. This could include compensation, supervision, justice system, benefits, budgets, etc.;

These three interdependent sub-systems need to be designed to meet the demands of the larger system in which the organization must exist.

Systems Thinking helps us design organizations that meet customer needs, business needs, and people needs. By recognizing the interdependency of the organization's sub-systems and its dependency on the larger system it supports, a flexible self-sustaining system can be created.

## **PARADIGMS AND SYSTEMS THINKING**

*“The world of the 90’s and beyond will not belong to ‘managers’ or those who make the numbers dance, as we used to say, or those who are conversant with all the businesses and jargon we use to sound smart. The world will belong to passionate, driven leaders...People who not only have an enormous amount of energy, but who can energize those whom they lead.”*

*–Jack Welch, GE*

Just recognizing we can and should use system thinking will not solve our pressing issues. We must apply these ideas in new ways by shifting our models, beliefs, and methods of designing organizations. Creation of high performance work systems requires a paradigm shift in the way we look at structuring, developing, and managing organizations for growth, profit, and survival. In essence, several “shifts” need to occur to create high performance through systems thinking. These “shifts” are detailed on the next page.

# THE “SHIFTS”

<u>OLD PARADIGM</u>	<u>NEW PARADIGM</u>	<u>WHERE IT IMPACTS IN THE ORGANIZATION</u>
<p>Maximum task breakdown; simple, narrow skills</p> <p>External controls (supervisors, specialists, staffs, procedures)</p> <p>Tall organizational chart, autocratic style</p> <p>The technology imperative</p> <p>People as an extension of the Machine</p> <p>People as an expendable spare part</p> <p>Competition</p> <p>Gamesmanship</p> <p>Organization’s Purpose Only</p> <p>Alienation</p> <p>Low risk-taking</p>	<p>Optimum tasks grouping; multiple skills; breadth &amp; depth of skills</p> <p>Internal controls (self-regulating, integrating sub-systems)</p> <p>Flat organizational chart, participative style</p> <p>Joint optimization</p> <p>People as complimentary to the Machine</p> <p>People as a resource to be developed</p> <p>Collaboration</p> <p>Collegiality</p> <p>Member’s and Society’s Purpose Also</p> <p>Commitment</p> <p>Innovation</p>	<p>Structure:</p> <ul style="list-style-type: none"> <li>• Division of labor</li> <li>• Responsibilities</li> <li>• Authority</li> </ul> <p>Work Design</p> <ul style="list-style-type: none"> <li>• Philosophy</li> <li>• Information</li> <li>• Knowledge</li> <li>• Rewards</li> </ul>

Systems thinking guides us to view organizations from broader perspectives than before. In systems terms, our approach:

**IS NOT**

- Problem driven
- Canned or recipe solutions
- An overlay/add on
- Business as usual

**IS**

- Purpose/product driven
- Collaborative centered
- Whole system design
- New way of doing business

Through this approach, organizations are created and designed to produce optimization of its sub-systems with the larger environment.

Systems thinking is a process that allows management to look at choices around the design variable to increase optimization of the parts and produce better outputs. The ideal is to create a balance between the environment, technical, and social systems.

**OPEN SYSTEM ANALYSIS**

Organizations, like other systems, are dependent on the external environment to grow, profit, and survive. Successful organizations have learned to look at their environment and adapt to meet ever-changing needs. We want to know who's out there, and what their requirements are, and finally, how well are we meeting their requirements. All organizations' needs are drawn from the environment; and all its products or services returned to the environment.

Organizations exist with the support and consent of the larger environment. The organization's central purpose (mission) and the way it pursues (producing process) that purpose must be wanted and supported by that environment. In the pursuit of its purpose, the organization then establishes objectives to meet its internal and external demands. For success, these objectives must be defined, integrated and acted upon in ways that are both internally congruent and externally compatible with the environment's own demands and needs.

In short, the organization that lives in harmony with its environment will grow, profit, and survive; the organization unresponsive to its environment will wither and die.

# LEARNING APPROACH

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***“I Hear and I Forget  
I See and I Remember  
I Do and I Understand.”***

**– Chinese Proverb**

***“Training Won’t Work,  
A Tool Approach Can’t Work,  
Copying Doesn’t Work Either.”***

**–John J. Sherwood**

***“Adults learn best when they  
take charge of their own learning.”***

**–Warren Bennis**

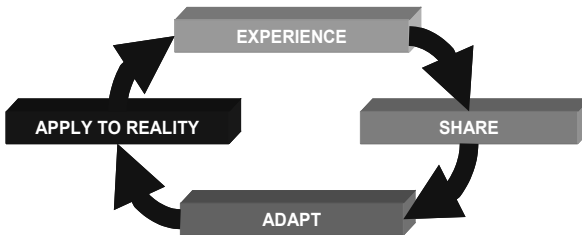
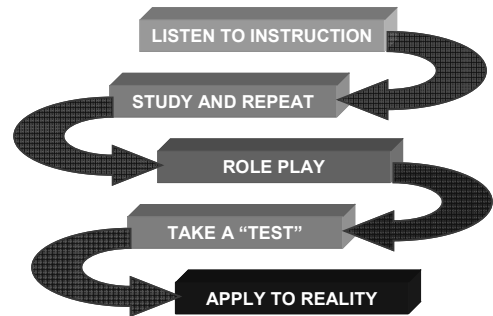
At the beginning of the workshop, participants *join a team* whose primary purpose is to market *learning products* about how organizations achieve and sustain higher performance. They play an active role in carrying out a series of *learning tasks* designed to enhance their personal growth and development.

These personal learnings are integrated into team products and *sold* through group presentations in the *market* place where other learning teams are also competing. This process builds throughout the workshop until the last day, when each team “markets” a “final product” or compilation of their week’s learnings.

# WHITEWATER LEARNING CYCLE

The hardest part of the individual learning process is moving from Quadrant 2 to Quadrant 3. This is where you build new skills and competencies based on your new understanding and it is only accomplished through doing and experiencing.

Traditional Learning environments focus on an instructor driven mode. The instructor is primarily responsible for the learning, format, testing and grading of “students.” Experiences and practical learning is limited to role plays and theory.



Whitewater Teams is designed based on an experiential learning model. Each participant is here to “experience” the journey of organizing and improving a team with all the success, failure, missteps, anguish and joy that accompanies that process. It is cyclical and changing. Your guides to this adventure have been here before – but are not your instructors. They are experiencing the session with you, offering their learning and confidence in this process to get us through the whitewater safely.

## EXPERIENCING

Learning begins with experiencing. Become involved in an activity; acting, behaving, performing, observing, seeing. Take action – do something. Experience is the basis for learning.

## SHARING

Following the experience itself, it is vital for individuals to share *their* reaction and observations with others who have either experienced or observed the same activity.

## ADAPTING

Flowing naturally from the *discussing* step is the need to develop principles or extract generalizations from the experience. Here, we state learning in a way that helps all of us further define, clarify, and elaborate them.

## APPLYING TO REALITY

The final step in the cycle is the application of the principles and learnings derived from the experience. The process is *not* complete until the new learning or discovery is used and tested behaviorally. Applying, of course, becomes an “experience” in itself, and with new experiences, the cycle begins again.

# TRANSITIONING

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## Moving From Traditional Learning to Continuous Learning

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### TRAINING VALUES

Closed  
 Firm/Fixed  
 Static/Rigid  
 Memorizing  
 Passive  
 Rote  
 Answers  
 Surface  
 Content (What)  
 Tactic Driven  
 Dogma  
 Job  
 Rules  
 Short Term  
 Thesis  
 Deductive  
 Facts  
 Narrow  
 Goals  
 Predictions  
 Left Brain

### THE TRAINING PARADIGMS

If the list of descriptive learning terms on the right looks strange, it's because we usually are not taught that way. Our educational system is really better at training than real learning. And that's unfortunate. Training is good for dogs, because we require obedience from them. The training terms listed on the left are what our existing organizations encourage, opt for short-term, least-costly, microeconomic bottom line. Bottom lines have nothing to do with developing people who can think and act independently and inter-dependently. We need people who can think and find problems not just solve problems, because the ones we face today are not always clearly defined, and they aren't linear—they are ambiguous!

### LEARNING VALUES

Open  
 Tentative/Flexible  
 Dynamic  
 Understanding  
 Active  
 Experiential  
 Questions  
 Depth  
 Process (How)  
 Strategy  
 Discovery  
 Life  
 Risk  
 Long Term  
 Synthesis  
 Inductive  
 Ideas  
 Broad  
 Alternative  
 Exploration  
 Whole Brain

—Adapted from Warren Bennis

# SYSTEM ACCOUNTABILITY

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Organizations live in an environmentally competitive reality. In order for organizations to be High Performing, they must continually measure themselves against their own expectations, the expectations of their customers or clients, and the requirements of their environment and use these measurements to continually improve their results.

For your learning organization to become High Performing and gain the most from this workshop experience, we have designed a process to continually assess and measure the results of your learning. Each learning organization will develop a *learning product* from each learning session and sell this product to yourself and the other teams. Your organization will also purchase products from the other organizations based on what you find meaningful and helpful.

At the conclusion of each marketing period, your team will have 20 units with which to purchase products (including your own). Product purchases must conform to the following guidelines:

- Most-preferred product needs to be at least twice the value of your least preferred product.
- No organization can receive the same point value.
- Maximum value distributed to any one organization is 10.

Your team will be allowed ten minutes at the end of the presentations to discuss, evaluate, and spend your units. You may wish to develop a criteria that will allow you to be more efficient and consistent in evaluating each product. The following questions may help guide your criteria.

- What was new or insightful from their product?
- How did the product impact me?
- Did the product meet my expectations?
- Do I know what I want from the Product?
- Will I take something back with me from their experience?
- Did the product tell me, show me, or involve me?
- Did the product help me gain new understanding?
- Was it the right size (quantity), the right material (quality), and the right feeling (impact)?

# PERSONAL LEARNING JOURNALS

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***“Keep a Journal. Pay at least so much attention to the visits of truth to your mind as to record them.”***

***–Ralph Waldo Emerson***

As part of our learning process, most of us tend to mull over and reflect on what happens to us in an effort to analyze and understand our experiences. We often lose some of the potential learning in our experiences because we pay less attention to the details and the complexities of our experiences than might seem to be worthwhile. One way to enhance a person’s learning rate and quality is to keep a journal. A page in each section of your notebook, called **LEARNING JOURNAL** has been provided for that purpose. Times have been set-aside in the schedule for writing in your journal.

This journal also gives you an opportunity to chart your growth in two critical areas of individual and team development which are:

- Growth Values (expanding the ability for continual personal growth)
- Team Skills (building group skills toward synergy and effectiveness)

In general, your journal will be most helpful to you if you record the following kinds of thoughts when they seem intriguing or worthwhile:

- Surprises / Speculations / Curiosities
- Things I have learned about:
  - Conflict
  - Feedback
  - Effective Meetings
- Things I want to learn more about or pay attention to
- Progress toward my learning goals
- Dilemmas/confusions/problems/questions
- What’s happening to me, in me
- What are the leadership requirements for change and growth

The journals for each Section have some memory joggers to get you thinking and reflecting. These journals, in conjunction with the Learning Processes discussed, should be excellent tools to enhance your individual learning about **WhiteWater Teams**.

# IN-HOUSE WORKSHOPS

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We at Whitewater Strategies, Inc. wish to assist you in your efforts to develop high performing teams within your organization. Whitewater Teams™ can play a key role in these efforts.

Companies sponsoring participants and desiring to include this workshop as part of their internal development strategy can do so by:

- Identifying internal company resources who have attended a WWT workshop and who can be certified as co-trainers.
- Providing the opportunity for these internal resources to “staff” a WWT and gain experience and certification.
- Develop a plan with Whitewater Strategies, to use the materials, workshop design, internal resources, and Whitewater resources in an in-house setting.

Although we desire and encourage you to apply the concepts and principles discussed in these materials, copying or other use of the materials or workshop design requires prior written permission from Whitewater Strategies, Inc. In this way, we can maintain the integrity of the materials and insure the responsible application of the design.

Please direct any questions or requests to use these materials to:

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# LEARNING

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## THE QUEST

***“These leaders are by no means ordinary people. They work out there on the frontier where tomorrow is taking shape, and they serve here as guides – guides to things as they are and as they will be. As diverse as they are in terms of background, age, occupations, and accomplishments, they are in accord on two basic points.***

***“First, they all agree that leaders are made, not born, and made more by themselves than by any external means. Second, they agree that no leader sets out to be a leader per se, but rather to express himself freely and fully.”***

***Warren Bennis***

The quest for learning begins within each of us and it takes only a moment. But it's a special moment. A moment of openness, of inquiry, of spontaneity, of creativity. A moment where you can say to yourself “I don't know and that's all right – I'll figure it out.” A moment of LEARNING!!

White Water Teams is designed to create those moments for each participant. It is designed to help us see ourselves and our interactions differently. To understand how we gain a vision of something new, how we build new habits and processes to be competent with new skills, how we come to master a new paradigm. But each person must take the journey themselves. Only then, after the struggle, may we reap the rewards.

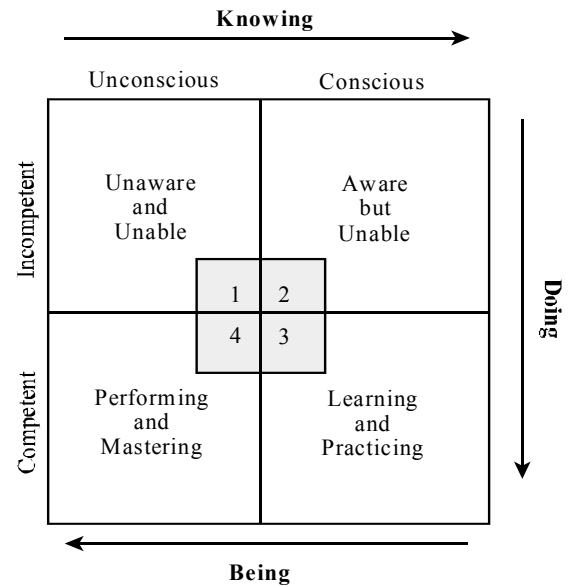
## THE MAP – UNDERSTANDING HOW WE LEARN

Learning is a continuous process. When we are young the new excites us. The challenge of doing something we see others do is a part of our natural existence.

Tying shoes is a simple example of this process. A young child may have watched his mother tie his shoes for him dozens of times during his first few years. Then suddenly, an awareness creeps into his mind – the awareness that he can tie the shoes himself. And so, grabbing the laces and winding them together, he tries to simply combine the laces together to look like what his mother did. But to no avail, they won't stay together.

With some instruction, the child begins to go through steps with the mother’s help. Suddenly, the shoe is tied. With some more coaching, it is tied again, not too well but successfully. And again, and again, and at once, it seems, the child is capable and no longer needs coaching to tie the shoe properly. This pattern continues until the child can literally tie the shoe unconsciously, without thinking. And even begins to change, modify, improve the way he goes about it. Maybe a double bow, or a special knot, maybe he just changes the lacing pattern. The Child is becoming the master of the shoelace. Later, he will have to rethink how he ties the shoe in order to teach the next generation.

Each of us is currently in Quadrant 1 in one or more areas of our life. We are unaware of a new technology, a new philosophy, a new tool or method for accomplishing a task. We are comfortable with that state and may even tend to feel that “the King is in his castle and all’s right with the world.” This is a safe place, a secure place, but it is blind to the “new,” the exciting, even the devastating which may be around the next corner. When a new idea, or talent, or methodology is realized, we find ourselves in Quadrant 2.



Quadrant 2 is an uneasy place. We are now aware of something new, but we are entrenched in habits which were comfortable in Quadrant 1. We have seen something different, exciting, scary, important, or maybe essential to the survival of our company, and we don’t have the new habits, skills, abilities, or knowledge to take advantage of it. This is the result of many “Benchmarking” activities. We have found a way to see something new, a different way to do something, a desirable set of benefits which might be derived from utilizing this method. But the path for us to integrate this into our lives or our company has not yet been constructed.

This uncomfortableness leads us to Quadrant 3. Here we must make the knowledge and awareness practice. Here we identify specific goals to seek, habits to break, habits to learn, and new patterns of living and working to incorporate. Here we face discouragement. We try, but fail. We may even decide to take haven back in Quadrant 1 since it is too painful to change. Here is where we concentrate and build the new skills necessary to be “competent and capable” in the new methods or habits.

Our continued efforts begin to pay off as we begin to be, act, and perform more according to the new methodology than to the past. We begin to do it without thinking. We tie the shoes without a thought for the steps in the process. We are quickly becoming masters of the “new” way. We are at Quadrant 4 and doing well. Quadrant 4 feels good again... and here is the next danger.

## **PERSONAL LEARNING – TAKING THE JOURNEY YOURSELF**

Being a learner is “child’s play” for the young. They have less fears of the unknown, less responsibility, less at stake if they make a mistake. As we grow older we cling to the “tried and true” methods of our past. Being a learner for adults requires giving up some security and moving outside the “box,” outside the comfortable, outside the familiar, outside of Quadrant 1.

There seems to be a high wall between Quadrant 1 and Quadrant 2. As high, it seems, as we have been willing to build it. It’s made of brick, much like the house of the third little pig, and ready to protect us from the outside.

Learners don’t have to tear down the wall, but they have to be willing to climb up on it, to look beyond and to “see” what lies on the other side. Learners move themselves from Quadrant 1 to Quadrant 2 by exploring, and opening their minds to something new. They do not betray their box, but do not need to defend it either. They recognize that their Quadrant 1 point of view may not be entirely accurate, current, or, at least, is not the only point of view and they are willing to see the new view. Once they’ve seen it, they are no longer completely comfortable in their box. One songwriter recognized this during the big war when he wrote: “How ya gonna keep ‘em down on the farm... After they’ve seen Paris?”

Learners, in moving from Quadrant 1 to Quadrant 2 now have a quandary. Is it better to keep doing what I was doing, or to incorporate some or all of this new information into my life and activities? Learners make a choice, and when the choice is that the new information is worth pursuing, they take on the challenge to move from Quadrant 2 to Quadrant 3. This move involves the gaining of skills and abilities/competencies/ knowledge (rather than just awareness).

They get specific. What does this new paradigm look like? Why is this new approach better? Why should I quit doing it this way? What results can and do I expect? And after the questions, they take a stand, set their hand to the plow, and try to make it work. There is no brick wall between Quadrant 2 and Quadrant 3. But there are hazards. The ground is unstable and may tip as you step across. It may rise up suddenly and roll you back to the protection of Quadrant 1. A wave of discouragement may strike without warning from the side and you retreat. Gusts of wind may make it hard to see your way clearly.

If you persist, concentrate, practice, fail, err, and try again... you build the skills. If you recognize that you are not “perfect” yet, you may avoid the hazard of hypocrisy. If you associate yourself with others who are making the same journey, you will find support and strength in numbers. “When the going gets tough, the tough get going.” This is where the challenge is. The victory and rewards go to the persistent and new skills to the disciplined. Integrity is renewed through aligning how you act with how you have decided to be.

Learners master their new habits. They move consciously, from Quadrant 3 to Quadrant 4 through this alignment of skills and abilities to desires and beliefs. There is no wall here, no hazardous terrain, but the slope is upward. The learner can always roll backward and have to repeat the struggle, the uncertainty, the pain. Not the struggle of learning the skills, but the struggle of leaving the old patterns.

The learner meets this challenge by looking quickly toward the next awareness. Quadrant 4 becomes Quadrant 1 without a struggle, without a wall, without even an upward grade. It becomes Quadrant 1 when we have built our new box, and “rest” within it. The new becomes our present, it becomes comfortable. As William Wordsworth put it:

*“The glory and the dream fade, the prison-house closes in after childhood,  
and custom lies on us ‘heavy as frost.’”*

We have grown; we have struggled; the world should recognize our effort, and how easy it is for us to feel we’ve made it. Eugene O’Neill struck hard at this cord with the following challenge:

*“Those who succeed and do not push on to greater failure are the spiritual middle classers. Their stopping at success is the proof of their compromising insignificance. How petty their dreams must have been! Only through the unattainable does man achieve a hope worth living and dying for and so attain himself.”*

# LEARNING VALUES

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## ORGANIZATIONAL

### PROTECTIVE VALUES

Safety  
Feeling Superior to Others  
Ego Defenses  
Self-Control  
Knowledge (Facts)  
Role-Playing (Gamesmanship)  
Comfort at all Costs (Avoid Pain)  
Control of Others  
Permanence

vs.

### GROWTH VALUES

Spontaneity (Risk & Freedom)  
Feeling Connected to Others  
Vulnerability  
Self-Knowledge  
Wisdom (Truth)  
Authenticity (Realness)  
Truth at any Cost (Accept Pain)  
Open Communication with Others  
Potential & Continuous Changes

## PERSONAL CHANGE

### FROM

Feel you've learned it all  
Reductionist thinking  
Depending on Procedures  
"They" are to Blame  
  
Certainty  
Stability  
(If it's not broken, don't fix it)

### TO

Learning never stops  
Systems thinking  
Focus on Results  
Personal Accountability  
(search within)  
Doubt ("I may be wrong")  
Change/Growth  
(Continuous Improvement)

## HUMAN CHARACTERISTICS

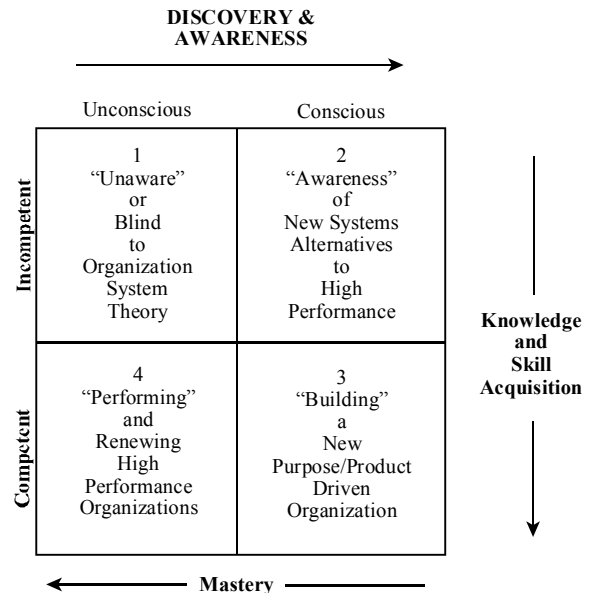
Integrity  
Embrace Error  
Encourage Dissent  
Positive Self-Image  
Personal Efficacy  
Empathetic Listening  
Belief in People & Teamwork

–Adapted from Warren Bennis

# LEADERS AND THE LEARNING PROCESS

Leaders are always moving from Quadrant 1 to Quadrant 2. They are challenging themselves to look at things in new and different ways. They want to see both the new inventions and the new de-ventions (the things that have always been done, but we have found ways to do more with less). They don't have to create the new paradigm, but they are always searching to understand how it applies to themselves, their company, family, and community.

Once they are aware of the new paradigm, they plan ways to incorporate it into their activities. More than that they push themselves to move into Quadrant 3 and "DO IT."



Leaders move from Quadrant 3 to Quadrant 4 and become Masters over and over again. By taking their awareness, moving it to action, and then practicing it they integrate it in their style and being. They strengthen their understanding and grasp it by learning to see the new paradigm and their fit within the paradigm through the eyes of their followers. They get feedback and continue to fine-tune. The way of mastery is continual self-improvement, building deeper integrity between actions and beliefs, between what they say and what they do.

Inexperienced or ineffective leaders may try to "sell" everyone on the new paradigm before trying to live it themselves. They are still acting in the old paradigm and can only be seen as hypocritical in the eyes of their followers. They function like "Shepherders" who push their followers into the unknown. They hide their struggle from others, wanting to seem adept, capable – even perfect – in the new paradigm.

Better leaders know that they must begin to try and demonstrate the new before they attempt to convince others. They function like a "Shepherd" who leads the way and experiences the unknown with the followers. They trust their own instincts before they ask others to trust them. They recognize and reveal their own struggle to change. They talk openly about the struggle and encourage others to struggle and win. They enlist others in helping them change and allow themselves to be coached.

## LEADERS MASTER THE PRINCIPLES OF LEARNING

Masters demonstrate patience with their followers, but do not sanction incompetence. They realize that they cannot improve in themselves what they do not see, and they depend on others to help them see it. They provide this service to their followers by giving them direct, clear, supportive, and honest feedback. They all share responsibility with their follower for understanding and learning to function in the new paradigm.

To the leader, there are no problem people. There are teams with problems and people with problems. Leaders build an open environment which supports both the team and the individual to resolve their problems if they choose to do so. When they choose not to solve the problems, the leaders allow them to face the consequences of such decisions. They do not solve the problems for them and they do not overlook the problems.

## SUMMARY POINTS IN LEADING LEARNING

- Leading Learning is:
- There are no final answers.
  - All solutions are provisional.
  - That worked well – how can we do better?
  - That failed, how can we repair the damage and move on?
  - That was a great mistake!! We sure learned a lot from it.
  - Let's try it together?
  - We will win in the long haul, if we continue to try and change.
  - Green and growing. Vital and changing.**
- Leading Learning is not:
- I've got it!!!
  - When will they get it?
  - We had it, how did we loose it?
  - You try it.
  - If you succeed – we will share the glory; if you fail – you are accountable.
  - Ripe and Rotting. Stale and stalled.**

# PURPOSING PROCESS

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## Team Product I

### OVERVIEW

High-performance systems know where they are going. They are characterized by a clear sense of direction and purpose, a vision of the future, a set of guiding principles and the audacity to dream “really big dreams.” High performance does not come from repeating someone else’s “credo” but by making clear personal choices, connecting those plans to the hopes and desires of the others in the group, and acting to make the dreams come true.

### PRIMARY OBJECTIVE

Begin your journey to high performance by looking to the horizon, clarifying and stating your team’s purpose in being here and clearly communicate your purpose to the other teams.

### EXPECTED OUTCOMES

- An understanding of each individual member’s learning objectives as well as personal hopes, fears, and concerns that may have an influence on your team’s ability to function effectively.
- A name and logo for your team that captures the “essence” of the team and its individual members.
- A shared and common vision for your team that includes the team’s purpose and objectives. This should include team members’ beliefs about what will be required for the team to be high performing.
- A set of operating principles, norms, ground rules, etc., to be utilized by your team.
- A team mission statement that communicates: “This is what makes us unique in the way we accomplish our purpose.”
- A strategy about how your team will operate to achieve its purpose and objectives while being faithful to your stated principles.
- A review of what you learned as you completed this task and your team’s working theories for use in guiding future team formation and “Direction Setting” efforts.
- Present your learnings (your team product) in a way that helps other teams benefit from your team’s work and results.

Each team will be allotted up to 10 minutes to make their presentation. Following the presentations teams will purchase (evaluate/score) the team products according to the accountability guidelines.

## **SUGGESTIONS**

Before you begin working on the task, reach agreement as to its objective and the outcomes that are expected. Once this is done, design a process for how your team will accomplish the objective and produce the desired outcomes. The following are suggestions you may wish to consider:

- Have each member complete the pre-assessments for Growth Values and Teaming Skills.
- Have each member of your team get better acquainted. Learn as much as you can about:
  - their likes and dislikes, their hopes and fears about the Workshop
  - the talents, expertise, and experience they bring to the team
  - their personal learning objectives
- Develop a list of common learning objectives for your team.
- Discuss the kind of culture you prefer to work in and why. Use this information to help you define your team's guiding principles, ground rules, mission, etc.
- Identify and select a name for your team along with a distinguishing logo. Discuss and understand how and why you made those particular selections.
- Determine why your team exists (primary purpose) and what objectives are needed to drive your team towards its purpose and shared vision.
- Determine your team's norms. Ask for and post suggested "ground rules" (or Do's and Don'ts) that the group itself might adopt in order to help realize its own expectations and avoid its apprehensions. These team norms or ground rules should guide your team's decisions and actions during the week. Pay particular attention to the development of norms for dealing with differences of opinion and controversy or conflict.
- Discuss what you have learned from this experience. Transform what you learn into working theories about the purposing processes of forming teams and setting direction.
- Prepare to share your team's learning with high impact and unique content so that the other teams in the Workshop can learn from your experiences.

# PURPOSEFUL SYSTEMS

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The central factor in team design is the system's primary purpose or core mission. Common purpose unifies. It unites the people inside the system with each other, as colleagues in pursuit of the same larger vision. It can unite the inside system with the larger outside system too.

The system then is united around a central value that is shared by all of the participants in the enterprise. But united *action* is required as well. It's not enough to simply have in mind a common vision.

The system must also be designed to produce results, to create outputs that are clearly in line with the system's mission. And to do so in a way that is responsive to continuing changes in technology, economics, social pressures, and other environmental factors. It must, in other words, be fully integrated and adaptive. It's a tall order, but it can be done. Here's some help in defining your team's purpose:

## CRITERIA FOR MISSION/VISION

- Simple, easy to remember
- Describes "distinctive competence"
- Singular: One aspect emphasized
- "Unattainable," but can be pursued
- Specific enough to see it being pursued
- Relevant, realistic
- One sentence reflecting learning products, distinction, customer

## CRITERIA FOR PHILOSOPHY/VALUES

- Limited number of tight statements
- Can be tested against behavior
- Reflects actual beliefs
- Describes "how" mission will be accomplished
- No unrealistic expectations

## CRITERIA FOR GOALS/OBJECTIVES

- Clearly relates to mission
- Reflect expectations
- Realistic and achievable
- Describes results desired
- Consistent with philosophy/values

# GROWTH VALUES

## The Six Dimensions of Inner Development

	<i>Description</i>	<i>Rating</i> 1 = Low 5 = High
<b>EMPATHY</b>	Actively participating in the feelings and ideas of others. Embracing differing views and opinions, knowing they are essential to understanding and synergy. The acceptance of others as they are, unique and marvelous creations in their own right.	1 2 3 4 5
<b>AUTHENTICITY</b>	The capacity to be at peace with yourself, know who you are, what you feel—to simply be yourself. You'll only be as good as you are capable of being real. Owning up to your own weaknesses, failures, and mistakes lets others know you're human. Playing a game or hanging on to old pre-assigned roles and responsibilities in a changing environment only inhibits growth and authenticity.	1 2 3 4 5
<b>SPONTANEITY</b>	The capacity to think out loud and act naturally without external constraints or being held within established lines. It's the ability to self-act or react in a real and natural way as events occur.	1 2 3 4 5
<b>COURAGE</b>	The ability to do what is right for the larger whole, knowing at times it is not a popular choice. Confronting others when it's needed and being able to withstand the backlash. Having the moral strength to venture where angels fear to tread while resisting opposition, strain, or threat.	1 2 3 4 5
<b>OPEN-MINDEDNESS</b>	The ability to act and make decisions provisionally, recognizing there may be a better way introduced tomorrow. This flexibility and open-mindedness allows us to deal with individuals and teams as they are, and at their own pace. This increases our receptivity to others' arguments, ideas, and thoughts.	1 2 3 4 5
<b>INTUITION</b>	The ability to react with confidence on limited data or information. Willingness to trust your gut, knowing something is different but not being able to put a finger on it. At times it can be those immediate insights gained that need to be shared, regardless of how hard they could be to substantiate.	1 2 3 4 5

# TEAMING SKILLS

## Personal Skill Promoting Group Effectiveness

	<i>Description</i>	<i>Rating</i> 1 = Low 5 = High				
<b>MEETING EFFECTIVENESS</b>	My ability to help a group come together, focus on the issues or purpose, establish meaningful roles and ground rules, use time effectively, involve and engage each member, measure their results, and meet their objectives.	1	2	3	4	5
<b>BRAIN-STORMING</b>	My ability to help the group listen to all ideas openly, seek unusual possibilities, be creative, refrain from judging the merits of the ideas, build onto previous ideas, and think beyond previous boundaries and constraints.	1	2	3	4	5
<b>PROBLEM SOLVING</b>	My ability to work within the group to identify and clarify the problem, investigate root causes, analyze possible alternatives, weigh benefits and costs, compare against the stated objectives, collect meaningful data, and agree on solutions.	1	2	3	4	5
<b>PLANNING/ ORGANIZING</b>	My ability to help identify what needs to be done, establish priorities, set a timetable for accomplishing the tasks, make assignments, review progress, and follow through to meet the objectives.	1	2	3	4	5
<b>DECISION MAKING</b>	My ability to work with the group to review all pertinent information, listen to clearly understand each point of view, openly share biases and concerns, value personal and group needs, decide together and fully support that decision.	1	2	3	4	5
<b>ASSESSING RESULTS</b>	My ability to help get clear on what has to be accomplished, set goals that are both objective and subjective, establish a scale for measurement, benchmark their current state, and regularly review results and progress.	1	2	3	4	5
<b>CONFLICT RESOLUTION</b>	My ability to help sort through differences that are getting in the way of the group's ability to accomplish tasks synergistically and collaboratively.	1	2	3	4	5
<b>GIVING FEEDBACK</b>	My ability to provide straightforward, honest, and helpful feedback to other members of the group in a respectful and developmental manner and to confront difficult issues with integrity and share responsibility for results.	1	2	3	4	5
<b>RECEIVING FEEDBACK</b>	My ability to hear and receive feedback from members of the group openly and non-defensively, seek to understand the key elements of the feedback, and respond to the feedback through responsible actions and commitments.	1	2	3	4	5
<b>DECISIVENESS</b>	My ability to take action and help the group move forward by listening to itself, agreeing on key elements, selecting a path, deciding and moving on. Helping to avoid waffling, false starts, and gridlock while allowing for constant field adjustments.	1	2	3	4	5

# LEARNING JOURNAL

## PURPOSING PROCESS

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### Teaming Skill and Learning Checklist

(Check the areas in which you excelled)  
(Circle the areas you wish to improve in next session)

#### Growth Values

Empathy

Authenticity

Spontaneity

Courage

Open-Mindedness

Intuition

#### Teaming Skills

Meeting Effectiveness

Brainstorming

Problem Solving

Planning/Organizing

Decision Making

Assessing Results

Conflict Resolution

Giving Feedback

Receiving Feedback

Decisiveness

1. What did I learn most around Growth Values and Teaming Skills?

2. My personal contribution to our team mission was:

3. What I learned most about my ability to work within a team was:

4. What made this meeting more effective? Less effective?

5. The things I learned that I most want to be able to use back home are:

# TECHNICAL PRODUCING PROCESS

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## Team Product 2

### OVERVIEW

World Class is one of many pseudonyms for high-performance. World Class organizations get there by producing their product or service better in every way than their competitors. Better quality, better efficiency, better costs, better environmental compliance, better safety, etc. Doing it better relies on having the equipment, processes and people aligned in a step by step process that is both repeatable and continuously improving.

### PRIMARY OBJECTIVE

To define and standardize your teams producing process. This should clarify the order and methods your team will use to develop their product each session.

### EXPECTED OUTCOMES

- A set of work design principles that will keep your team highly productive and motivated.
- A producing process that describes “how” your team plans to produce its learning products and fulfill its purpose and objectives.
- An understanding of how your team’s producing process differs from traditional work processes you’ve experienced.
- A working theory about designing high performance production processes considering what your team has designed for itself vs. what you have currently at work.
- Present your learnings (your team product) in a way that helps other teams benefit from your team’s work and results.

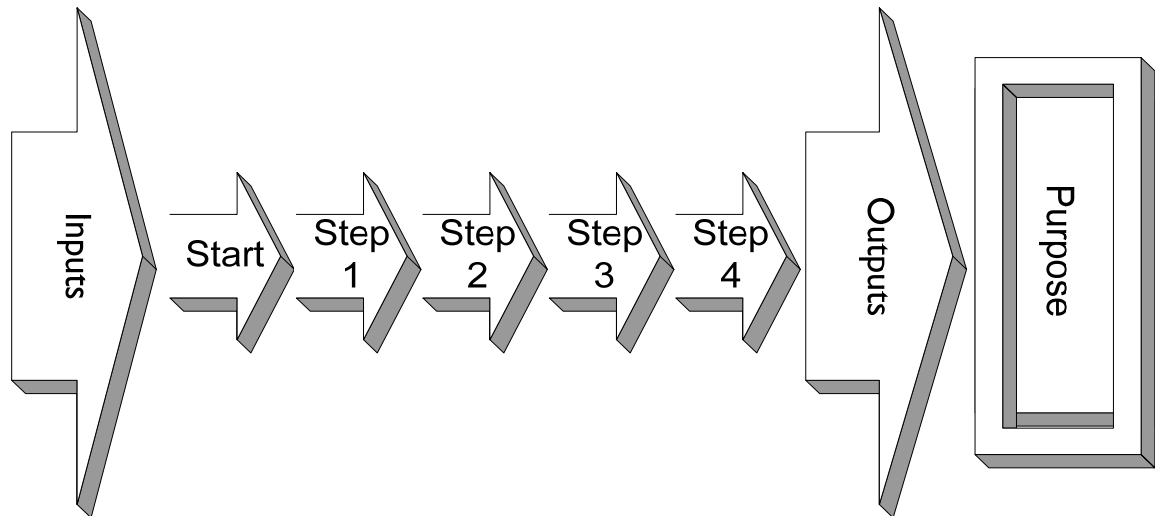
Each team will be allotted up to 10 minutes to make their presentation. Following the presentations teams will purchase (evaluate/score) the team products according to the accountability guidelines.

## **SUGGESTIONS**

Before you begin working on the task, review the desired outcomes and reach agreement as to its objective and the outcomes that are expected. Once this is done, design a process for how your team will accomplish the objective and produce the desired outcomes. The following are suggestions you may wish to consider:

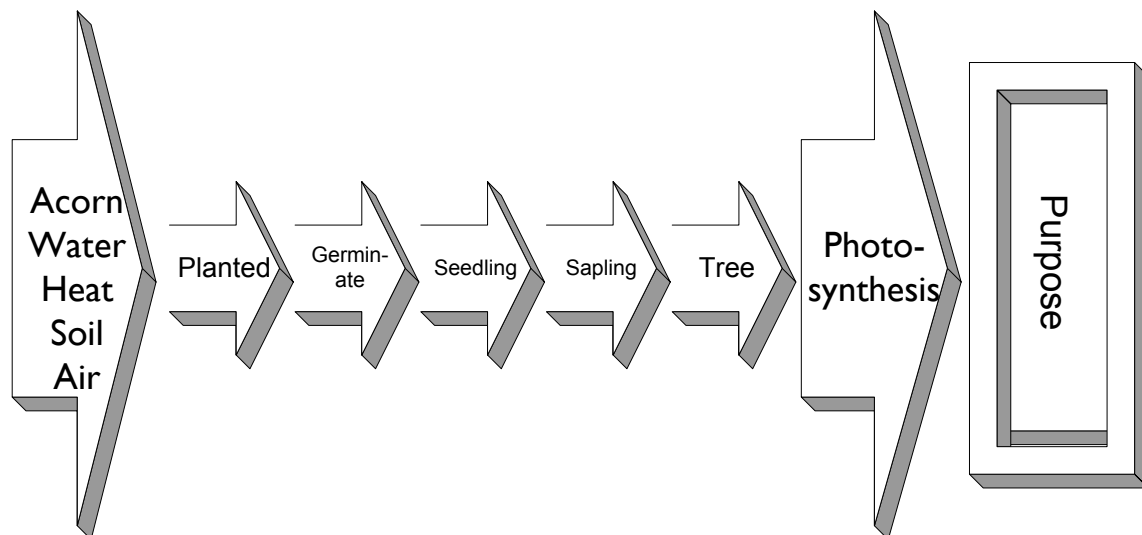
- Openly discuss the following questions:
  - a) How does work traditionally get organized to produce a product or service?
  - b) How do we want to get organized to produce our learning products and fulfill our objectives and mission?
  - c) Does our process make full use of all our available resources?
  - d) Does our process fully utilize our team members' strengths and developmental desires?
- Review how you set about the task of creating your team logo, vision, mission and guiding principles. What were the steps in your "producing process?" What needs to be added/deleted in order for it to become your producing process?
- Review and discuss Cherns' *Work Design Principles* prior to developing your own team's set of work principles.
- Assess your learnings, and transform them into a working theory about designing high performance production processes. Determine the application of these theories to your home location.
- Prepare to share your team's unique learnings in a way that the other teams will remember and can benefit from your experience.

# Identifying the Steps



High Performing teams “produce” That is, they effectively transform inputs into outputs by using effectively designed and clearly understood team processes. Every process has a set of “steps.” We begin – we act, act, act, etc. and at some point we complete the process.

Processes often reuse steps or modify the order of the steps – but the “steps” are fixed in some time frame. Getting there more quickly and congruently helps define high performance. Taking the model above and applying it to nature we might have a process like this:



The acorn seed and inputs (water, sunshine, air, etc.) combine and the seed changes state. It will literally burst open (germinate) with part of it pointing up and part of it pointing down.

This germinated seed continues to change state as it interacts with the environment, absorbing water, heat, and nutrients. It develops a root pushing downward and a trunk pushing upward. It becomes a seedling. The seedling continues to grow and change state. It develops leaves which start photosynthesis (converting sunshine, sap and carbon dioxide into sugar), develops a trunk, and when it attains a height of 6 feet, it is a sapling. As it continues to develop and attains reproductive capacity, it will again change state, becoming a tree.

High performance teams develop a joint understanding of their producing process from input to output. This understanding is in terms of what happens to the inputs as they become outputs, rather than what we do to those inputs. In our example, we understood what happened to the acorn, not what was done to it.

Technical systems understanding allows teams to manage and control their outcomes, instead of just doing assigned tasks. The team examines inputs (raw materials) and how those inputs become the final product, satisfying stakeholder requirements and meeting their purpose.

# CHERNS' WORK DESIGN PRINCIPLES

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The process of design itself must reflect the values found in the new paradigm. Organizational design or redesign cannot succeed in the end if the process of design does not follow certain principles, for it is the process which sets the pattern of the culture for the newly designed organization. These principles are:

## **COMPATIBILITY**

- The way in which the design is carried out should be compatible with the design's objective.
- All organization members participate toward the same objectives; no one can be omitted.
- The degree to which this principle is respected greatly influences long-term commitment to the design.

## **MINIMAL CRITICAL SPECIFICATION**

- Identify only what is essential and specify as little as possible about how the work is to be done.
- In defining roles, tasks, objectives or boundaries only the key minimum requirements should be specified so as to not close-off options and possible improvements by those who will do the work.

## **VARIANCE CONTROL**

- Variances should not be exported across unit, departmental, or other organizational boundaries.
- If they cannot be eliminated, they must be controlled as close as possible to their point of origin.
- Controlling variances at other than their source has the effect of trying to correct their consequences rather than preventing them.
- Control of variances is also greatly affected by the location of internal boundaries.

## **BOUNDARY LOCATION**

- Determining internal organizational boundaries; i.e., the separation between units, sections, divisions, is critical in the design of any organization.
- Boundaries must not impede the sharing of information, knowledge, and learning.
- Boundaries should be drawn so that:
  - members have access to and control over the variances that occur while performing work;
  - members can develop substantial control over their own activities in achieving the goals;

- members have access to all the information they need to solve the unit's problems and assess its performance; i.e., they receive adequate feedback;
- the unit can complete a whole transformation process or produce an identifiable output; i.e., the boundary should not cut through the middle of a process;
- coordination between activities and people can be accomplished **within** the unit, leaving integration with other units to boundary managers;
- the unit contains all the skills and abilities needed to accomplish its work;
- the need for external control is minimized as the unit is given the means to regulate itself.

## **INFORMATION FLOW**

- Information processes allow the continual flow of information to a work unit and throughout the system.
- Information should be available quickly to those who require it.
- Blocks to information flow are not only horizontal, but vertical.
- Information systems that provide management with comprehensive and detailed information about the operations offer a virtually irresistible temptation to over-supervise and to intervene in subordinates' decisions. Under these circumstances, the individual or team cannot feel ownership of the unit's performance and cannot truly be held responsible for it.
- The key to designing effective information systems is to design them in cooperation with their primary users and to remember that primary users should always be the first to receive information needed to take action or control variances.
- Information required for record should be readily available for recall when needed. Information for the control of behavior is an element of the "old paradigm" design, and if considered at all in the new design, should be given directly to unit members or teams as part of their information base for self-management.

## **POWER AND AUTHORITY**

- Those who need equipment, materials, or other resources to carryout their responsibilities should have access to them and authority to command them.
- In return, they accept responsibility for them and for their prudent and economical use.

## **THE MULTI FUNCTIONAL PRINCIPLE –ORGANISM VS. MECHANISM**

- The traditional form of organization relies very heavily on the redundancy of parts and requires people to perform highly specialized, fractionated tasks. People are seen as a replaceable part. Simple mechanisms are constructed on the same principle.
- Complex systems require a large repertoire of skills, abilities, and knowledge from the participants.
- This flexibility allows both generalization and specialization within the organization.

- The Organization is more adaptive and less wasteful for each element to possess more than one function.
- The computer, for example, is a typical Multifunctional mechanism.

## **SUPPORT CONGRUENCE**

- The systems of social support should be designed so as to reinforce the desired results and culture.
- If, for example, the organization is designed on the basis of group or team operation with team responsibility, a pay system incorporating individual members would be incongruent with these objectives.
- Not only payment systems, but systems of selection, training, conflict resolution, work measurement, performance assessment, timekeeping, leave allocation, promotion, and separation can all reinforce or contradict the behaviors which are desired.
- Management philosophy should be consistent and that management's actions should be consistent with its expressed philosophy. Not infrequently a management committed to philosophies of participation simultaneously adopts systems of work measurement, for example, which are in gross contradiction.

## **TRANSITIONAL ORGANIZATION**

- Starting up a new design entails a lot of stress.
- Transition activities and leadership must continually apply and observe the objectives and philosophy of the new design or the lack of resolve will undermine the change effort.
- Developmental and selection processes demonstrate the reality of the new philosophy.

## **INCOMPLETION OR THE FOURTH BRIDGE PRINCIPLE**

- Design is a reiterative process. The closure of options opens new ones. At the end, we are back at the beginning. The new paradigm is that of an organization flexibly adapting to its environment. Although a certain degree of stability is necessary to operate, the organization must be prepared to review and revise its design. Being prepared means having mechanisms built into the structure of the organization at all levels to deal with changes it must make on a continuing basis. "Redesign is not the task of a special design team; it is the function of self-regulating operating teams provided with the techniques of analysis and the principles of design."

(Adapted from "Principles of Sociotechnical Design Revisited" by Albert Cherns, 1992)

# LEARNING JOURNAL

## TECHNICAL PRODUCING PROCESS

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### Teaming Skill and Learning Checklist

(Check the areas in which you excelled)

(Circle the areas you wish to improve in next session)

#### Growth Values

Empathy

Authenticity

Spontaneity

Courage

Open-Mindedness

Intuition

#### Teaming Skills

Meeting Effectiveness

Brainstorming

Problem Solving

Planning/Organizing

Decision Making

Assessing Results

Conflict Resolution

Giving Feedback

Receiving Feedback

Decisiveness

1. What did I learn most around Growth Values and Teaming Skills?
2. What did I learn about the connection between your purpose and producing process?
3. What did I learn as we organized ourselves and produced our product without prescribed “leadership” from outside our team?
4. What can I do more of or less of to be more effective in producing our team’s product?
5. The things I learned that I most want to be able to use back home are:

# CONTROL PROCESSES

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## Team Product 3

### OVERVIEW

High performance teams see control from a different perspective than the world does. In the systems model, control fits between the technical and social processes and allows the team to insure that the best product is produced in the best, most effective way. Control is about controlling the product variability and making the best decisions as a group to ensure high quality performance. As adults, we have all developed various problem-solving methods, which we test and improve with experience. To become a high performance team, team members collectively must establish and continually improve procedures for solving problems that prevent the team from getting the best results.

### OBJECTIVE

The purpose of this task is to provide an opportunity for your team to build and analyze its problem solving methods in order to increase the effectiveness of the team's Social Interactive Processes.

### EXPECTED OUTCOMES

- From the problem solving exercise, "Assignment Unknown," develop an understanding of:
  - a) Your team's current problem solving process.
  - b) The effect of this process on the team's ability to satisfy individual and production needs.
- A set of guidelines that your team will use in the future for solving team problems.
- A plan to test and improve your team's ability to solve problems that will enhance its functioning as a high performing system.
- Present your learnings (your team product) in a way that helps other teams benefit from your team's work and results.

Each team will be allotted up to 10 minutes to make their presentation. Following the presentations teams will purchase (evaluate/score) the team products according to the accountability guidelines.

## **SUGGESTIONS**

Before you begin working on the task, reach agreement as to its objective and expected outcomes. Once this is done, design a process for accomplishing the objective and producing the desired outcomes. You may wish to consider the following suggestions:

- Discuss with each team member the observations they had about your team performance in the problem solving experience. Summarize your team's conclusions.
- Share your feelings and reactions about the problem solving process that your team used in the problem solving exercise. (Your Group Process Questions on the back of Assignment Unknown will be of use here.)
- Reach consensus on the barriers that have inhibited your team from being effective at problem solving team problems and determine what can be done to improve your team's effectiveness.
- Using the General Problem Solving Model as a start, develop general guidelines that your team can use in the future to solve team problems. Implement these guidelines.
- Identify how your team will control its time and resources in solving problems and producing each product.
- Assess your learnings from this activity, and develop a working theory about effective team problem solving processes.
- Prepare to share your team's learning in a manner in which other teams will benefit from your experience.

## **GUIDELINES FOR ASSIGNMENT UNKNOWN EXERCISE**

- Each team member reads Assignment Unknown introduction.
- Privately each team member completes Step 1 of Assignment Unknown by ranking the items listed "1" through "13" (Take a minimum of 15 minutes to complete this task.)
- As a team, complete Step 2 of Assignment Unknown by agreeing on a team ranking for the items listed. Do not change your Step 1 individual scores. Take a minimum of 45 minutes to complete this step.
- As individuals complete Step 3.
- Call your facilitator for the Step 4 rankings

# ASSIGNMENT:



## A Group Planning Experience

*You have just been selected as a member of a top secret task force. In order to minimize the danger of security leaks, the nature of the Assignment is being withheld, even from you, until the last possible moment.*

*You and the other task force members have accepted these conditions, along with the responsibility and authority to first devise a plan for managing*

*the Assignment and then, after your plan has been reviewed and approved, to carry out the Assignment.*

*Your task force has been deliberately formed of people with experience in a number of areas. There are two reasons for this: to confound speculation on the nature of your Assignment; and to provide the task force as broad a range as possible of*

*knowledge and skill to ensure that you'll arrive at the best possible plans.*

*None of you has been told anything else about the Assignment, except that it will be complex and will require the services of additional people at the implementation stage.*

*Good Luck – and Good Planning!!!*

# ASSIGNMENT UNKNOWN

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## **Your Task:**

Even though your Assignment is unknown, your task force must now complete a preliminary plan for managing it. On this page is a list of 13 activities, arranged in random order. Your task is to rank these activities according to the sequence you propose to follow in managing the Assignment. This sequence must be approved by the people at the top before your task force will be given the nature of the Assignment and the go ahead to begin work on it.

## **Step One:**

You have a little time left before your task force is scheduled for its first meeting. Look over the list of activities without discussing it with anyone.

Then, rank the items on your own, according to the sequence that makes the best sense to you for managing the Assignment. Give the first activity an “1”, on down through “13” for the last activity.

## **Step Two:**

Now, as a team, meet with your fellow task force members to agree on the sequence of activities that should be followed.

## **Guidelines For Reaching Consensus:**

You must arrive at substantial agreement (not necessarily unanimity) on the rank assigned each team. This is seldom easy. Nevertheless, a group simply brings more firepower to problem-solving than could any of its members working alone.

Open and accurate communication is essential to reaching the best possible decision.

Some suggestions:

1. No averaging, majority-rule voting, or horse-trading.
2. Avoid arguing to win as an individual. What’s “right” is the best collective judgment of the group.
3. Avoid changing your mind only to reach agreement or avoid conflict.
4. Accept responsibility for both hearing and being heard.
5. View differences of opinion as helpful rather than as a hindrance.
6. Make value judgments about what is best on the basis of the information, logic, and feelings of the members.

## **A Word of Caution**

Group decision-making is not always the best, or the most practical, way to solve problems. It is time-consuming. Members must be able to work together effectively; they must each have an important stake in the outcome. And in amicable groups, especially, there is the clear and present danger of narrow “groupthink.” With the exception of brainstorming, most creative tasks are best left to talented individuals. Neither is group work advisable in other cases where individual tasks can be performed well independently.

Groups are most useful in goal setting when the problem requires that information must be brought together from several sources to produce a solution, or when effective implementation of the decision will require the commitment of others.

<b>Team Activities</b>	Step 1 Individual Ranking	Step 2 Team Ranking	Step 3 Individual Post Ranking	Step 4 WWT Preferred Ranking	Step 5 Individual Item Score (1-4)	Step 6 Team Item Score (2-4)	Step 7 Individual Post Score (3-4)
A. Identify the major areas of responsibility.							
B. Measure progress against plan.							
C. Decide on a basic course of action.							
D. Take corrective action, as appropriate.							
E. Develop possible alternative courses of action.							
F. Collect and analyze relevant facts of the situation.							
G. Assign responsibilities and authority level.							
H. Identify and evaluate the possible consequences of each course of action.							
I. Establish measurable progress-evaluation criteria (timing, sequencing, etc.)							
J. Determine desired end results (set objectives).							
K. Identify and analyze under-lying assumptions about the project.							
L. Define the specific tasks or activities involved.							
M. Execute the plan.							
<b>TOTALS</b>							
					Individual Score	Team Score	Individual Score

**Group Process Questions**

<i>Circle your response</i>	<b>Very Little</b>	<b>Little</b>	<b>Some</b>	<b>Quite a bit</b>	<b>Very much</b>
1. To what extent did others pay attention to your ideas?	1	2	3	4	5
2. To what extent did you listen and pay attention to others?	1	2	3	4	5
3. How frustrated did you become while reaching the Team decisions?	1	2	3	4	5
4. To what extent did you actively seek contributions from others?	1	2	3	4	5
5. How responsible and committed are you to the final decision that was made?	1	2	3	4	5
6. How much do you think the Team's ranking will resemble that of the experts?	1	2	3	4	5
7. What percent of the time did you lead the Group by:					
▪ contributing information	0	25	50	75	100
▪ helping the Group work together	0	25	50	75	100

**Group Performance Survey**

<b>Group</b>	<b>Most Accurate Individual Score (a)</b>	<b>Average Individual Score (b)</b>	<b>Team Consensus Score (c)</b>	<b>Return on Time Invested Score (b-c)</b>	<b>Team Effectiveness Score (a-c)</b>

# PROBLEM SOLVING MODEL

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## Nine Easy Steps

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- ≡ Identify basic issue/problem
- ≡ Define deviation from standard or norm
- ≡ Gather necessary information
- ≡ Analyze causes for deviation
- ≡ Develop possible actions or solutions to eliminate causes
- ≡ Evaluate consequences of alternative solutions
- ≡ Implement the best solution
- ≡ Monitor and evaluate results
- ≡ Revise, as necessary

# TEAM DECISION MAKING

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- ≡ Lack of Response
- ≡ Chance
- ≡ Authoritarian
- ≡ Minority Rule
- ≡ Majority Rule
- ≡ Major Majority Rule
- ≡ Compromise
- ≡ Unanimous
- ≡ Consensus

# LEARNING JOURNAL

## PROBLEM SOLVING/DECISION MAKING

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### Teaming Skill and Learning Checklist

(Check the areas in which you excelled)

(Circle the areas you wish to improve in next session)

#### Growth Values

Empathy

Authenticity

Spontaneity

Courage

Open-Mindedness

Intuition

#### Teaming Skills

Meeting Effectiveness

Brainstorming

Problem Solving

Planning/Organizing

Decision Making

Assessing Results

Conflict Resolution

Giving Feedback

Receiving Feedback

Decisiveness

1. What did I learn most around Growth Values and Teaming Skills?

2. What I learned about compromise was...  
About win-win...

3. The best thing about our team's problem solving process was...

4. What strengths/limitations did I bring with me that helped/hindered our effectiveness?

5. The things I learned that I most want to be able to use back home are:

# INDIVIDUAL VITALITY

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## Team Product 4

### OVERVIEW

People are at the center, the catalyst of teams that are either effective or useless. Teams cannot be effective built on tired, disillusioned, and distraught individuals. Effective teams are built by “vital,” growing and advancing people. Dr. Wayne Pace has described this “vitality” through four basic work perceptions. They are:

- Performance – The perception that I “**Do Better**”
- Opportunity – The perception that I’m “**Moving Ahead**”
- Fulfillment – That I “**Work free**” or that I choose to be there
- Expectation – That I “**Want More**”

### PRIMARY OBJECTIVE

The purpose of this task is to help you learn from experience how effective teams integrate the needs of the “team” with the needs and desires of the “individuals” and build processes to keep the individuals vital and growing.

### EXPECTED OUTCOMES

- A better understanding of the factors that impact your personal vitality and the vitality of others.
- Conclusions about how well your individual needs and expectations, and the needs and expectations of the other members of the team, are being met.
- Guidelines or processes for functioning as a team that will increase the level of member satisfaction and vitality.
- Present your learnings (your team product) in a way that helps other teams benefit from your team’s work and results.

Each team will be allotted up to 10 minutes to make their presentation. Following the presentations teams will purchase (evaluate/score) the team products according to the accountability guidelines.

## **SUGGESTIONS**

Before you begin working, reach agreement as to the task's objective and the desired outcomes that are expected. Once this is done, design a process for accomplishing the objective and producing the desired outcomes. The following are suggestions you and your team may wish to consider:

- Take a few minutes to glance over the material in this section.
- Individually, develop a list of conditions that contribute to your personal effectiveness and well-being. These should be based on real experiences. The page "Conditions for Satisfying Individual Needs" can be used to facilitate this process.
- Working alone, list four or five recent experiences or projects which made you feel highly energized and effective. Reflect on each experience, trying to identify what generated these feelings – which important individual needs were being satisfied? Below is a list of some common needs which you might find helpful.

## **COMMON POSITIVE NEEDS**

having power	feeling supported
feeling appreciated	being competent
being active	being involved
feeling accepted	feeling secure
being certain	being fairly treated
being free to choose	being in control
being valued	being respected
being understood	being liked
being included	achieving things

- On the basis of your conclusions about your individual needs and their relative priorities, write a short paragraph on the form entitled "IDENTIFYING KEY INDIVIDUAL NEEDS," that begins with "If I am to be energized, effective, and high-performing when working with others, I need to feel..."
- Repeat the process, this time identifying and analyzing three or four experiences which caused you to feel frustrated and/or experience low energy and negative feelings. The following is a list of some common "negative" feelings and needs which you may find useful.

## COMMON NEGATIVE NEEDS

feeling powerless  
feeling regimented  
being manipulated  
not being valued  
being blamed  
feeling excluded  
feeling insecure  
feeling uncertain

feeling controlled  
feeling helpless  
being ignored  
feeling misunderstood  
being negatively judged  
feeling rejected  
being treated unfairly  
feeling anxious

- Once again on the form provided, write a short paragraph that begins with “If I am to be energized, effective and high-performing when working with others, I need to avoid...”
- Share your information with the entire team, then working together, interview each member to understand what they really want or need from the team in return for contributing their talents and energy toward the accomplishment of the team’s purpose and objectives. Consider the following:
  - a) What they believe their most important needs are.
  - b) The reasons for their conclusions.
  - c) Whether or not they feel their needs are being adequately satisfied by the way your team has been functioning and why.
  - d) What changes should be made in the way your team is functioning to help them better satisfy their needs.
- After all members have shared, develop a processor set of guidelines your team will follow to ensure the continued satisfaction of important individual member needs.

# IDENTIFYING AND SATISFYING INDIVIDUAL NEEDS

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*“Get to know your people. What they do well, what they enjoy doing, what their weaknesses and strengths are, and what they want and need to get from their job. And then try to create an organization around your people, not just your people into those organization-chart rectangles. Organizations work when they maximize the chance that each one working with others, will get growth in his job.”*

*“And look at the rewards we’re offering our people today: higher wages, medical benefits, vacations, pensions, profit sharing, gymnasiums, swimming pools, bowling, and baseball teams. Not one can be enjoyed on the job. You’ve got to leave work, get sick, or retire first. No wonder people aren’t having fun on the job.”*

*–Robert Townsend, Further Up the Organization*

Individuals are the focal center of our working systems. They provide the vitality and creativity to take technology and make it do more, do better, and go beyond its design. Understanding how to unlock this potential, knowing what inspires them to greatness, to innovate, to dedicate and commit is an essential element of high performance.

To recap – in building a unique process for individual needs, we need to identify and clarify the needs of our team members, understand what it takes to satisfy those needs in the work setting, and commit to team actions which will promote individual and team growth.

## **IDENTIFYING KEY INDIVIDUAL NEEDS**

One way to identify your Key Individual Needs is to recall and describe your own experiences in a variety of situations and identify key need satisfactions related to them. On the next page is a worksheet that you can use to help you do this.

## **IDENTIFYING KEY INDIVIDUAL NEEDS**

If I am to be energized and effective when working with others, I need to feel...

If I am to be energized, effective, and high performing when working with others, I need to avoid...

**SATISFYING INDIVIDUAL NEEDS**  
**WHAT WE WANT OR AVOID**

Most individuals want and need to:

- feel influential
- have freedom to decide and act
- have some control over what happens
- feel valued, respected
- be understood
- be well informed
- be praised, credited
- be competent
- be active, involved
- be accepted
- feel secure, safe
- receive just treatment, fairness
- feel stimulated

Most individuals want to avoid feelings of being:

- powerless
- controlled, regimented
- helpless, manipulated
- ignored, not valued
- misunderstood
- ignorant
- blamed, criticized
- incompetent
- left out
- rejected
- insecure
- unfairly treated
- bored

## **CONDITIONS FOR SATISFYING INDIVIDUAL NEEDS**

The following are some organizational conditions that contribute to the satisfaction of interests and needs of the individual members of an organization:

### Adequate and fair compensation

- meets personal standards of sufficiency
- perceived as fair when compared with what others receive

### Safe and comfortable working conditions

- reasonable hours
- minimum risk of injury or illness
- reasonably comfortable physical surroundings

### Immediate opportunities to develop and use personal capacities

- exercise of wide range of skills
- adequate, timely information
- opportunities to learn new skills, to gain new knowledge
- opportunities to choose courses of action, to make decisions
- opportunities to develop and execute plans
- opportunities to do meaningful work

### Future opportunities for growth, advancement

- current activities can lead to more desirable activities (and rewards) in the future

### Social acceptance and support

- relative freedom from prejudice
- considered equal, not inferior to others
- cooperative relationships
- work role that is meaningful

### Recognition of individual rights

- freedom to state views without fear of punishment or reprisal
- fair treatment with regard to pay, privileges, job security, rules, policies
- recognition of right to personal privacy in non-work related matters

### Balance between work and non-work demands on personal time

- work schedule allows adequate leisure and family time
- work schedules consistent with preferred life style

### Social prestige of job and Company

- “society” values the Company and its procedures
- “society” approves the work role

# INDIVIDUAL VITALITY AND THE FOUR BASIC WORK PERCEPTIONS

By Dr. Wayne Pace

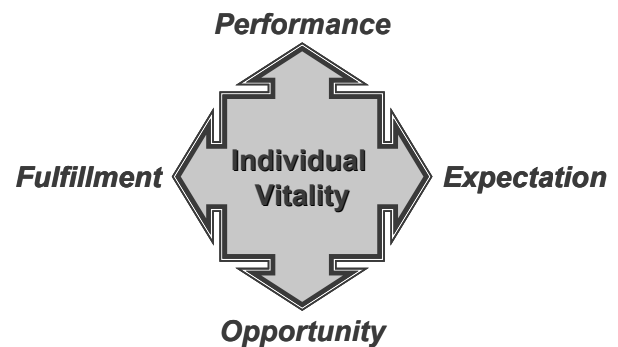
One of the most insightful observations that has been made about human beings is that they behave consistent with their perceptions of a situation. Perceptions represent the sense that people make out of their lives. Perceptions have a powerful impact on people. For example, research shows that people who perceive and rate themselves as being in good health tend to live four times longer than those with comparable actual health, but who perceive and rate themselves as in poor health.

An individual's perceptions of their work environment and the system in which they work are what empower each individual to take the initiative and expend energy in getting their work done. Said more directly, "If managers and supervisors are going to get the best performance from their work groups, they must consider not only the actual work environment but employees' perceptions of the workplace. Successful management requires supervisors to look beyond the real work world and adopt a perceptual model for influencing performance as well, focusing on the perceptions that have an impact on performance" (Kinlaw, p. 38).

## Four Work Perceptions

Four basic perceptions head the list of critical factors that have an important impact on decisions and actions of workers:

- An employee's perceptions of how well his or her **expectations** are met by the organization.
- An employee's perceptions about what kinds of **opportunities** are available for him or her in the organization.
- An employee's perceptions of the degree of **fulfillment** he or she derives from work in the organization.
- An employee's perceptions of how well he or she is **performing** in the organization.



These four perceptions are shaped by the work environment resulting from the interactions workers have with key elements of the system:

- other workers
- the leaders
- the work itself
- the organizational structure
- organizational guidelines.

When the four work perceptions are positive, they combine to create a single concept called vitality or dynamism. If any one of the perceptions turns out to be negative or disappears for some reason, the overall sense of vitalization and enthusiasm is diminished. Thus, the four positive work perceptions affect decisions and actions that encourage workers to perform with disciplined energy to achieve the goals that they have accepted at work.

Why these perceptions vitalize individuals in the work place follows this general line of analysis. The beginning of our careers--our life's work--is comprised, to some extent, of a set of expectations rooted in a series of perceived promises. A promise is some assurance--real or imagined--that someone or something (often the organization) will give us or help us accomplish something in the future. Employment itself is a form of promise. When we get a job, the assumption is tentatively established that the future may turn out the way we imagined it would. Continued employment reinforces the promise. Advancement on the job enables us to confirm that the promises underlying the agreement of employment are being fulfilled. If things go well, we become confident that the promises were sincere. Although some occasional set-backs may occur, on the whole, a career that progresses systematically appears, more often than not, to be based on real, sincere promises.

### **Expectations**

Most of us started working with the anticipation and hope that what we were doing would lead to continued advances in income, position, status, responsibility, or other benefits. Expectations represent what people think will happen to them. Promises are the assurances that lead to expectations. When we are assured that something will happen, we are led to expect it to happen. Thus, one major factor that reveals or reflects work vitality is a person's reactions to how well his or her expectations have been met by the organization where the person works.

Expectations represent anticipations, desires, hopes, and wishes for what should happen to a person at work. Expectations develop from real or imagined promises or assurances imputed to the organization about what will happen in the future as part of their association with the organization. For example, if the workforce is composed of highly trained and well qualified workers who have devoted many years to preparing for work in the organization, they may bring with them anticipations and desires about the work they are to do, how they are to be treated, what the organization will provide, and the proper role of the organization in society.

Employees who perceive that their expectations are based on failed promises tend to become dissatisfied, disillusioned, frustrated, angry, defensive, and insecure. The ultimate consequence for an organization in which expectations are viewed as not being met is seething unrest, potentially aggressive interaction, and low morale.

### **Fulfillment**

One of the reasons why unmet expectations lead to such negative consequences on employees is the keen sense that failed expectations is a sign of an unfulfilled life. A fulfilled life is one in which the person has done things his or her way and with whatever amount of

imagination, creativity, and uniqueness was available. Fulfillment at work indicates that employees feel that they are successful in doing and achieving what they want to and in ways that they chose.

In 1946 Peter Drucker wrote that "work appears as something unnatural, a disagreeable, meaningless and stultifying condition of getting the pay check, devoid of dignity as well as of importance. No wonder that this puts a premium on slovenly work, on slowdowns, and on other tricks to get the same pay check with less work. No wonder that results in an unhappy and discontented worker--because a pay check is not enough to base one's self-respect on" (p. 179).

Fulfillment at work since 1946 does not appear to have changed considerably. In 1985 Macleod, for example, reported that many employees "think of the work place in ways that are remarkably analogous to the way one might describe a **prison**. It is a place that they tolerate only because they feel they are compelled to. They 'escape' at quitting time, on weekends, for vacations--and ultimately, when they retire. Many, including some in highly paid professional and executive positions, would ruefully admit that the term 'wage slave' describes them all too accurately" (p. 215).

Macleod empathetically explains that "prison inmates surely tend to think that their only chance for happiness and satisfaction is 'on the outside'. . . [and] many employees (including professionals and executives) seem to look upon their time on the job in much the same way. They watch the clock, they daydream, they expect little satisfaction on the job." She raises some relevant questions: "Is it any wonder that full job involvement and satisfaction is the exception instead of the rule? And is it any wonder that productivity, effectiveness, and efficiency are so much less than they could be?" She makes a good argument when she says that organizations and employees must find ways to achieve fulfillment, "not only for their own sake but also for the sake of better working effectiveness, productivity, and corporate success" (p. 218).

### **Opportunity**

Opportunity represents a situation or condition favorable for the attainment of a goal. Thus, if you are employed in an organization and there are few or no conditions that are favorable for you to achieve a goal, you will no doubt say that you lack opportunity. If you think that conditions are favorable for you to receive a promotion or a salary increase, you will tend to feel that you have opportunity in the organization. Employees feel enthusiastic about their work if they perceive themselves eligible for and able to advance themselves and their status in the organization.

For opportunities to exist, employees must be able to achieve their goals. Abel found, for example, that to fill a position successfully in the organization that he was studying, it was necessary for prospective applicants to meet certain norms and exhibit particular stylistic tendencies. As employees understood and displayed the styles and met the norms, they were more likely to be promoted. Individuals who were promoted to top positions in the organization exhibited styles that showed self-confidence, cheerfulness, boldness, and

independence. Employees who were able to identify the relevant norms and to display appropriate styles were those most likely to be promoted.

Employees appear to be able to recognize when they have opportunities in an organization and when they do not. Managers, also, tend to recognize when an employee meets critical conditions and can report that an employee has opportunity in the organization. In our research, one of the most consistent predictors of promotion and salary increases was the evaluation by an employee's manager of the extent of the employee's opportunities in the organization, not how well the employee was actually doing in terms of performance evaluations. Employees nearly always reported having opportunity in the same degree as perceived by their managers.

Opportunity perceptions may be the most powerful of the four, since they have such potentially devastating consequences when not present. To highlight how critical perceived opportunity is to the life of an employee, let us highlight five categories of behavior identified by other researchers (Kanter; Wheatley) that are affected by opportunity in organizations—positively if opportunity is present and negatively if opportunity is not present.

### **Self Esteem**

- Every employee is susceptible to changes in self-esteem through the reflected image that he or she gains from others.
- Those who receive positive images about their abilities through comments and reward come to value themselves more highly.
- Those who feel locked into repetitious tasks or who feel invisible to others, gradually lose the self-esteem they once possessed.
- Experienced and talented employees often voice genuine doubts about their abilities when they face continual rejection.
- Employees in their mid-forties, for example, who have been passed over for promotion often become highly self-critical and lose confidence in the skills they once proudly displayed. What has changed, usually, is not their skillfulness, but their perceptions of opportunity.

### **Aspirations**

- Opportunity also affects an employee's aspirations or desired achievements.
- If the organization reinforces and rewards actions that support certain types of goals, employees tend to develop aspirations to reach those goals.
- Employees who have been stuck in one position for a lengthy period of time tend to curtail any aspirations they might have had initially. In the absence of such aspirations, they fail to see themselves in any other position. If a new position is eventually offered to them, they respond negatively because they have lost the internal vision of themselves that matches the new opportunity.
- Employees who consistently experience little or no opportunity gradually suppress any larger vision of their potential and represent themselves to others as tentative, self-doubting, and content to stay where they are.

### **Commitment**

- Opportunity also affects the extent to which employees remain committed to an organization.
- Those who experience opportunity through personal growth and recognition tend to feed their positive feelings back to the organization. They become motivated to do more, to spend extra hours working, to look for additional ways to contribute, and to try innovative ways to improve productivity.

- Those who receive negative information about opportunities gradually withdraw from or completely leave the organization. The withdrawal may be subtle in that they continue to do what is asked but at minimally acceptable levels.
- They may, on the other hand, transfer their energy to another arena, to some other organization or activity, where the response is more positive.

### Energy

- Employees with blocked opportunity tend to turn to their peers for comfort and recognition. The recognition obtained from friends may have less to do with how well they perform their jobs at work and more to do with how skilled they are in sports, recipes, or gardening.
- They may devote more energy to contacts and information exchange on tangential activities and less to the work itself. Employees who see high opportunity respond to recognitions of their value by becoming more focused on the task and wasting less time in contacts and interactions that are not related to completing their work.

### Problem Solving

- Employees high in opportunity tend to be proactive in addressing problems in their work and in the organization.
- If they recognize or identify a potential problem, they act on their own initiative to solve it before it becomes a major issue in the organization.
- For the person without opportunity, organizational problems reflect a personal discontent. Instead of acting to resolve problems, they tend to wait passively and grumble. If someone suggests a solution, they are the first to criticize it.
- Since their own life in the organization has been primarily negative, they may even derive some satisfaction from seeing the organization in trouble.

### Performance

The fourth set of work perceptions has to do with an employee's performance. Employees' perceptions of their performance concern how well they think they are doing their work. Others who have thought about this issue call these perceptions "self-efficacy" (Bandura) or just plain "self-confidence" (Druckman and Bjork). Two types of behaviors or work tasks appear to encompass the critical elements of job performance: functional tasks and behavioral tasks. The first, functional, has to do with how well an employee completes the mechanics of the job, including primarily the completion of technical aspects of the job. The second, behavioral, has to do with how well the employee handles interpersonal activities with others in the organization, including resolving conflicts, managing time, motivating others, working with a group, and working independently.

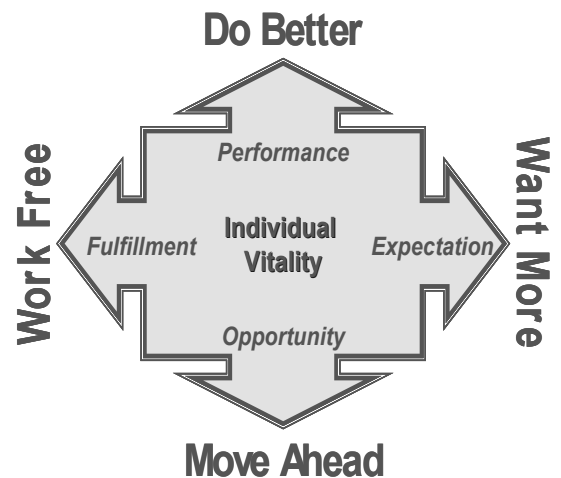
Gilbert has framed the issue of perceptions of worker performance in a meaningful way: "When we set about to engineer performance, we should view it in a context of value. We should not train someone to do something differently unless we place a value on the consequence--unless we see that consequence as a valuable accomplishment." He concludes with this aphorism: "Roughly speaking, **competent** people are those who can create valuable results without using excessively costly behavior" (p. 17).

When workers perceive themselves as unable to perform their work competently; that is, when they perceive themselves doing work that fails to create valuable results while consuming time, energy, and resources, they feel frustrated, disappointed, confused, and angry. They diminish the

vigor with which they approach their work and reduce the effort they put into solving problems and moving ahead.

Maintaining positive work perceptions require continuous acts of courage. As Herman observed, "a thoughtful examination of the day-to-day workings of organizations will quickly reveal that at all levels, an important determinant of organization performance are the thoughts and actions of individual people. Whether it is a chief executive assuming the risk and responsibility for pursuing a new acquisition, a middle manager making a full commitment to adopting employee-involvement groups in her division, an individual contributor doggedly following through on a technological inspiration, or an hourly employee sacrificing his free time in order to train and qualify for a new job, acts of individual courage count" (p. 16).

We have often summarized the four key work perceptions in two different ways, as an acronym representing performance, opportunity, fulfillment, and expectations: POFE, pronounced **Pofay**, and as goals to be achieved in an organization. Performance is translated as the goal To Do Better; opportunity represents the goal To Move Ahead; fulfillment concerns the goal To Work Free; and expectations lead to the goal To Want More.



Those are the code words when you talk about work perceptions. They are important in understanding why anhedonia sets in and why a resurgence of vitality occurs, resulting in an organization with dynamism.

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# LEARNING JOURNAL

## INDIVIDUAL NEEDS

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### Teaming Skill and Learning Checklist

(Check the areas in which you excelled)

(Circle the areas you wish to improve in next session)

#### Growth Values

Empathy

Authenticity

Spontaneity

Courage

Open-Mindedness

Intuition

#### Teaming Skills

Meeting Effectiveness

Brainstorming

Problem Solving

Planning/Organizing

Decision Making

Assessing Results

Conflict Resolution

Giving Feedback

Receiving Feedback

Decisiveness

1. What did I learn most around Growth Values and Teaming Skills?

2. What I experienced about my team's interest and involvement in helping me meet my needs was:

3. What I felt about my role in helping other team members fulfill their needs was:

4. The most important linkages between individual needs and team performance are...

5. The things I learned that I most want to be able to use back home are:

# **SOCIAL & ORGANIZATIONAL I TEAM GROWTH PROCESSES**

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## **Team Product 5**

### **OVERVIEW**

High-Performing Teams have social processes that enable them to grow and develop. Work teams and organizations who aspire to become High Performance Systems need to develop growth processes that help them mature. The process of team maturity begins with team members assessing the degree to which they have assumed functions formerly handled by supervision.

### **PRIMARY OBJECTIVE**

This task provides your group the opportunity to investigate your team's growth process and develop ways to increase the effectiveness of your team's social process. Through this experience, each member should learn individual responsibility to create synergy.

### **EXPECTED OUTCOMES**

- Awareness of your team's social process and the elements associated with your team achieving higher levels of performance.
- Understanding how individual and team energy impact team performance and what conditions influence this energy.
- A plan to enhance your team's effectiveness.
- A report of what your team discovered as a result of this task and the working theories on team growth and development.
- Present your learnings (your team product) in a way that helps other teams benefit from your team's work and results.

Each team will be allotted up to 10 minutes to make their presentation. Following the presentations teams will purchase (evaluate/score) the team products according to the accountability guidelines.

## SUGGESTIONS

Your team needs to reach agreement as to the desired outcomes (objectives) for this task. With your objectives in mind, design a process for accomplishing the desired outcomes. The following elements will help your group accomplish this task.

- Talk through the concept of “social core processes” and determine what it means to your group. Some items you may discuss or explore are:
  - interaction with one another
  - perception of each member being part of the group
  - common sense of group purpose
  - awareness of each other’s needs and potential resource contributions
- Draft your feelings about your personal energy for the workshop so far and then share with the team. The following table can be helpful.



- When did you feel excited, turned on?
  - When did you feel bored, disenchanted?
  - Describe what you were doing at these times.
  - Describe what others were doing.
- Read through the material on Team Growth Stages and complete the group process questionnaire.
- When this is completed, share your findings with your team members. Reach agreement on what stage your team is currently in and what stage to which your team aspires.
- Identify the methods your team plans to use to reach the desired growth stage and what changes need to be made in your team’s social processes to attain this.
- Construct some working theories on the relationship between social processes, individual performance, and team performance. An article entitled “Cog’s ladder” may be helpful in understanding one of the key theories.
- Determine how you will help the other teams benefit from what your team learned from this experience.

# SOCIAL PROCESSES

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## Without People, There Is No Social System

The Social System and its human processes bring life to the organization and enable it to succeed and survive long term.

These processes work together creating a culture or social system which supports their common purpose. Social processes are always our inventions. Whether we choose to actively and consciously design them, or permit them to develop by accident is up to us.

This section will allow us to explore our social processes in two unique ways:

- Understanding and assessing the team's growth and maturity in all four areas of social process development.
- Exploring the team's process for sharing work, responsibility and leadership.

A healthy social system first and foremost must be able to **accomplish and achieve** its purpose. However, if it is to continue performing over the long haul, it must also perform three more basic functions (Cherns & Wacker, 1978). These three survival functions include **adaptation** in and accommodation to the external environment; **integration** of the activities and sentiments of people within the system; and attending to the **long term development** and latent resources of the organization.

Teams build effectiveness through developing healthy social processes in four critical areas, which are:

- |                                |  |
|--------------------------------|--|
| <b>Goal Attainment -</b>       | Team processes for setting, measuring, and achieving goals in line with the system's primary objectives.   |
| <b>Adaptability -</b>          | Team processes for adapting to changes in the external environments in order to meet the needs of its stakeholders.                                      |
| <b>Integration -</b>           | Team processes for collaborating and coordinating with the internal environment to manage conflicts and insure overall system integrity and performance. |
| <b>Long-Term Development -</b> | Team processes for assessing, maintaining, and expanding their team and individual knowledge, skills, and abilities.                                     |

# TEAM GROWTH STAGES

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The process of maturity begins with the team members assessing their own growth and the degree to which they have assumed functions formerly handled by supervisors. As the individual team members grow and mature, one can observe the team's growth from dependency on others to true interdependence between team members and other teams. A first step to renewal can come from assessing how the team is currently functioning. "The Questionnaire on Team Maturity" is a list of the characteristics that can be condensed into three basic categories:

## DEPENDENCY

The beginning stages of dependency on others is initially characterized by adventure, apprehension, excitement and enthusiasm. Team members attempt to clarify their hopes and fears and identify the norms and ground rules by which they intend to operate. At this stage, members usually feel that they have little or no control. They are polite and submissive and look to the "established line" for direction and leadership.

## COUNTER-DEPENDENCY

As team members gain a better appreciation of their new roles and become more comfortable with their own work requirements, they begin to challenge the existing authority structure. Some decide that they no longer need superiors and bosses. This counter-dependence toward others outside their team is displayed as rebellion, blaming others and management for their problems, as well as challenging the new design. So much energy, both physical and emotional, is expended in resolving these issues that a "burnout" or "peaking out" syndrome often follows.

## INTERDEPENDENCY

As team members begin to resolve internal conflicts and discover that they must take responsibility for their own behavior, a new sense of dependency on others outside their team is realized. External relationships are revisited and revised and the larger purpose is viewed in light of the interdependent parts. The team itself stabilizes and views the new design and the organization more realistically. The excitement, "easy fix" mentality, and the fighting are gone. New, redefined attitudes and approaches toward other teams, departments, and management begin to emerge. Teams begin to accept responsibility for solving their own problems.

## A Questionnaire on Team Maturity

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Instructions: Circle as many of the following characteristics as you feel your team is currently experiencing.

- |   |   |
|---|---|
| 1. Objectives poorly set                      | 43. Success emulated by others                  |
| 2. Resistance to change                       | 44. Hidden agendas                              |
| 3. Members protect the team                   | 45. Mistakes defended at all costs              |
| 4. Selective listening                        | 46. Conformance to the established line         |
| 5. Aligned with the needs of the stakeholders | 47. Informality and respect                     |
| 6. Blaming others for production problems     | 48. Goal is to make it through the day          |
| 7. Failure and mistakes expected              | 49. Alliance to myself only                     |
| 8. Pride and satisfaction                     | 50. Purpose is central                          |
| 9. Fuzzy goals                                | 51. Hidden feelings                             |
| 10. Little care for others                    | 52. Clear common objective                      |
| 11. Looking for new opportunity               | 53. Alliances and cliques formed                |
| 12. Who says we should change?                | 54. Discussions focus on the past               |
| 13. Evaluations made outside meetings         | 55. Outside help expected                       |
| 14. New members welcomed                      | 56. Little thinking                             |
| 15. Self-serving team members                 | 57. Trust and openness                          |
| 16. Strong need for structure                 | 58. In-fighting/Attacks at authority            |
| 17. Goals are imposed on us                   | 59. Objectives not known/cared about            |
| 18. Need permission to act                    | 60. Burn-out                                    |
| 19. Strong opinions shared respectfully       | 61. Personal weaknesses ignored covered-up      |
| 20. Polite conversations                      | 62. Open to purposeful change                   |
| 21. Little listening                          | 63. Set own goals to achieve overall objectives |
| 22. Conflicts unresolved                      | 64. Lack of trust                               |
| 23. Outside input is welcomed                 | 65. Cohesiveness                                |
| 24. Supervisor/leader has the power           | 66. Resistant to outside input                  |
| 25. Suspicion                                 | 67. Mistakes are used as evidence               |
| 26. Bids for power                            | 68. Personal weaknesses attacked                |
| 27. Authority is questioned                   | 69. Fear of change                              |
| 28. Real feelings shared outside              | 70. Whole system is important                   |
| 29. Strong need for approval                  | 71. Leadership discussed behind their backs     |
| 30. Happy, vital and rewarded                 | 72. We can handle anything                      |
| 31. Authority is central                      | 73. Nit-picking                                 |
| 32. Feelings kept to oneself                  | 74. Shared leadership                           |
| 33. Development is a waste of time            | 75. Active listening                            |
| 34. Conflicts resolved by voting              | 76. Not working in a unified way                |
| 35. Confusion and stress                      | 77. Act, regardless of the consequences         |
| 36. Misdirected energy                        | 78. Protecting knowledge from others            |
| 37. Lack of stability                         | 79. Act in awareness and responsibility         |
| 38. Flexibility                               | 80. Outside help is required                    |
| 39. It's up to "them"                         | 81. High goal attainment                        |
| 40. Second guessing                           | 82. Mistakes are made but eagerly examined      |
| 41. Commitment debated                        | 83. Appreciate each other's talents and skills  |
| 42. All team members contributing             | 84. Pioneering spirit felt in team              |

## Scoring the Questionnaire

### Part 1—Team Maturity Assessment

Characteristic	Questionnaire #'s	Number Circled	% of Total Circled
Dependent	6, 9, 10, 13, 16, 18, 20, 21, 22, 24, 25, 29, 31, 32, 36, 39, 44, 46, 48, 49, 51, 54, 55, 56, 59, 61, 69, 80		
Counter-Dependent	1, 2, 3, 4, 12, 15, 17, 26, 27, 33, 34, 35, 37, 40, 41, 45, 53, 58, 60, 64, 66, 67, 68, 71, 73, 76, 77, 78		
Interdependent	5, 7, 8, 11, 14, 19, 23, 28, 30, 38, 42, 43, 47, 50, 52, 57, 62, 63, 65, 70, 72, 74, 75, 79, 81, 82, 83, 84,		
<b>TOTALS</b>			<b>100%</b>

### Part 2—Team Process Breakout

Characteristic	Questionnaire #'s	Number Circled	% of Total Circled
<b>Goal Attainment</b>			
Dependent	9 - 24 - 29 - 36 - 48 - 55 - 59		
Counter-Dependent	1 - 17 - 26 - 40 - 45 - 67 - 73		
Inter-Dependent	7 - 8 - 43 - 52 - 63 - 81 - 82		
<b>Adaptability</b>			
Dependent	16 - 18 - 31 - 39 - 46 - 54 - 80		
Counter-Dependent	2 - 12 - 27 - 37 - 58 - 66 - 77		
Inter-Dependent	5 - 23 - 38 - 50 - 62 - 72 - 79		
<b>Integration</b>			
Dependent	6 - 13 - 21 - 22 - 32 - 49 - 61		
Counter-Dependent	4 - 15 - 34 - 41 - 53 - 68 - 76		
Inter-Dependent	14 - 28 - 47 - 57 - 65 - 70 - 75		
<b>Long Term Development</b>			
Dependent	10 - 20 - 25 - 44 - 51 - 56 - 69		
Counter-Dependent	3 - 33 - 35 - 60 - 64 - 71 - 78		
Inter-Dependent	11 - 19 - 30 - 42 - 74 - 83 - 84		
<b>Totals</b>			<b>100%</b>

# BUILDING A PLAN

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**A**fter exploring the concepts, building and understanding, and agreeing together on where our team should develop, we need to put this information into an actionable format and begin to move from Quadrant 2 to Quadrant 3. The action plan involves three major parts:

- First: Identifying the most important “gaps” between our development goals and objectives.
- Second: Setting short-term goals and ways to measure our progress.
- Third: Do it, Do it, and Re-do it.

Development of new skills, abilities and habits, whether personal or for the team, is the “great divide” between awareness and competency, between knowing and doing, and between hypocrisy and integrity. It has been said “Those that can—Do. Those that can’t—Teach.” That is gravely misspoken. Teaching a team, especially one which is to perform efficiently and effectively, requires competent leaders who have taken the developmental journey and are willing to go on it again with the team.

There is no “magic formula” to making the plan effective. There are several suggestions which we offer:

- Keep it Simple and Straight-forward (KISS).
- Focus on the “Critical Few” (Pareto Principle—20% of the problems account for 80% of the results).
- Set Goals together, with the team.
- Measure it yourself, when it’s happening. After-the-fact measures rarely give you the information quick enough to adapt, integrate and attain.
- Depend on each other and set regular, focused follow-up.
- Review, re-set and refocus within 6 months.

# SOME OTHER MODELS

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Various researchers on group development have proposed any number of clearly-identifiable stages of group life. These lists represent seven such examples:

**Ritual Sniffing**  
**Infighting**  
**Experimentation**  
**Effectiveness**  
**Maturity**

**FORMATION**  
**CONTROL**  
**EFFECTIVENESS**  
**MATURITY**

**Test Membership**  
**Establish Friendship**  
**Address Disagreements**  
**Manage Differences**  
**Support Individuals**

**Adventure**  
**Dependence**  
**Counter-dependence**  
**Resolution**  
**Inflation**  
**Disenchantment**  
**Interdependence**

Polite  
Why are we here  
Bid for Power  
Constructive  
Esprit

**Forming**  
**Norming**  
**Storming**  
**Performing**

Inclusion  
Control  
Productivity  
Maturity  
Death

Adapted from: Woodcock & Francis  
Taylor & Felten  
George Charrier (Cog's Ladder)  
Interact  
Felten & Christensen  
Blanchard

# INDIVIDUAL/TEAM GROWTH QUESTIONNAIRE

**INSTRUCTIONS:** Decide first the degree or extent to which each characteristic applies to you. Then, based on your first answer, decide what result or impact your behavior has for the team.

Team Characteristics	Degree/Extent	Result/Impact
	Lo _____ Hi	Neg _____ Pos
<u>Mutual Trust.</u> I can state my views and differences without fear of ridicule or retaliation. I encourage others to do the same.	1-2-3-4-5	1-2-3-4-5
<u>Mutual Support.</u> I can obtain help from others on the team and give help to them.	1-2-3-4-5	1-2-3-4-5
<u>Openness.</u> I can say what I feel and how I am reacting, knowing the team is listening. I listen and try to understand other team members.	1-2-3-4-5	1-2-3-4-5
<u>Team Objectives.</u> No objective will be assumed by the team until it is clearly understood by all members.	1-2-3-4-5	1-2-3-4-5
<u>Conflict Resolution.</u> I accept conflicts as necessary and desirable. I don't suppress them or pretend they don't exist.	1-2-3-4-5	1-2-3-4-5
<u>Utilization of Member Resources.</u> My individual abilities, knowledge, and experience are fully utilized by the team, and I use those of other members.	1-2-3-4-5	1-2-3-4-5
<u>Control Methods.</u> I accept the responsibility for keeping discussions relevant and for the integrity of the team operation.	1-2-3-4-5	1-2-3-4-5
<u>Individual Diversity.</u> I respect individual differences. I don't push others to conform to central ideas or ways of thinking.	1-2-3-4-5	1-2-3-4-5
<u>Feedback.</u> I accept and give advice, counsel and support to others while recognizing individual accountability and specialization.	1-2-3-4-5	1-2-3-4-5

# COG's LADDER

Although teams seldom develop in accordance with a predetermined plan, they do go through stages of development which can be identified and described. You might find the COG's Ladder conceptual model to be useful as an aid for planning the transformation of your team into a High Performance System. The model was developed by George Charrier and described in an article entitled Cog's Ladder: A Model of Group Development.

The Model is based on the theory that teams go through five identifiable stages as they move from being a collection of individuals to becoming an effective, High Performance team. Charrier characterized the stages as being like the steps of a ladder. In his view, teams are likely to experience all these steps as part of their development process. While each step of the ladder must be experienced, different teams will not necessarily experience them at the same time or to the same degree. The following is a brief description of the Model.

<b>ESPIRIT</b>	
<ul style="list-style-type: none"> <li>➤ High creativity</li> <li>➤ High spirits/morale</li> <li>➤ Mutual acceptance, need for approval is absent</li> </ul>	<ul style="list-style-type: none"> <li>➤ Cliques absent</li> <li>➤ High cohesiveness</li> <li>➤ New member will cause regression</li> <li>➤ Intense loyalty to earlier stage</li> </ul>
<b>CONSTRUCTIVE</b>	
<ul style="list-style-type: none"> <li>➤ Attitude change</li> <li>➤ Open minded</li> <li>➤ Active listening</li> <li>➤ Team spirit starts to build</li> <li>➤ Cliques dissolve</li> <li>➤ Cooperation</li> </ul>	<ul style="list-style-type: none"> <li>➤ Leadership shared</li> <li>➤ Group identity important</li> <li>➤ Conflict is viewed as a positive means</li> <li>➤ Effective use of resources to examine all sides of an issue</li> <li>➤ Difficult to bring in a new member</li> </ul>
<b>BID FOR POWER</b>	
<ul style="list-style-type: none"> <li>➤ From outside</li> <li>➤ Members are closed-minded and accused of not listening</li> </ul>	<ul style="list-style-type: none"> <li>➤ Some groups never get past here</li> <li>➤ Task can be fulfilled, solution not optimum</li> </ul>
<b>WHY ARE WE HERE?</b>	
<ul style="list-style-type: none"> <li>➤ Define objectives and goals</li> <li>➤ Cliques grow and wield influence</li> <li>➤ Identity as a group still low</li> </ul>	<ul style="list-style-type: none"> <li>➤ Begin risk taking</li> <li>➤ Sense hidden agendas</li> </ul>
<b>POLITE</b>	
<ul style="list-style-type: none"> <li>➤ Getting acquainted</li> <li>➤ Sharing values</li> <li>➤ Cliques are formed</li> <li>➤ Stereotyping takes place</li> </ul>	<ul style="list-style-type: none"> <li>➤ Hidden agendas stay hidden</li> <li>➤ Conflict usually absent</li> <li>➤ Feedback and disclosure at a minimum</li> <li>➤ Approval needs apparent</li> </ul>

Charrier calls the first step on the ladder the Polite stage. In this stage, group members focus on getting acquainted, sharing values and establishing the basis for a group structure. Members usually experience a strong need to be liked and accepted. They usually engage in polite conversation and information-sharing, relying on stereotyping to help categorize other members. It is during this stage

that groups establish an emotional base for future group structure. Cliques are sometimes formed which exert a strong influence on future activities of the group. While some personal agendas are shared, many remain hidden. Conflict is usually absent.

As teams begin to develop, most members seek to find their place in the group in relation to others. They are highly attuned to both verbal and non-verbal signals that let them know where they stand. The members get to know how similar or different they are from the others. A team in this stage may appear to have good working relationships, but the relationships are usually superficial and fragile.

Charrier calls the next stage of development the Why Are We Here? stage. Tentative agreements are reached concerning group goals. Written agendas become more important. Cliques grow and merge and begin to wield influence. Hidden agendas begin to be exposed as members struggle to identify common purposes. The need for approval declines and members begin taking modest risks. Needs for clarity and certainty lead to an increase in structure.

The third stage on the ladder, Bid For Power, is characterized by win-lose competition and conflict as members begin to sort out personal relationships of power and influence. Alliances are formed and certain members begin to emerge as potential leaders of the group. Strong-willed members try to get other members to accept their positions on matters and to take actions they feel to be appropriate. Listening decreases, people take sides in conflicts, and struggles for leadership occur.

While a team is in this stage, some members become very uncomfortable as latent hostility surfaces. This causes some members to withdraw while others try to take control. Cliques become more important, as members seek to increase their power through their membership in them. Hidden agendas lead to mistrust, with pressures being exerted to get them revealed. Criticism increases, creativity wanes, participation varies widely. Frequently, members will look to outside authority figures for help and guidance in dealing with their internal conflicts. The members continue to feel a strong need for structure and the certainty it brings, which is reflected in the appointment of people to leadership roles. People who play the roles of harmonizers, gatekeepers and compromisers become more valued.

During this stage, three questions assume paramount importance. These are:

1. Who will control the team?
2. How will control be exercised?
3. What will happen to the “deviants”?

The team must find answers to these questions if it is to progress. If answers are not found, the team’s development will be blocked. Some groups will not be able to grow beyond this phase without help from someone outside the group. The time spent in this phase depends to a large extent on the mix of personalities in a group and the member’s ability to deal with conflict.

After a team has resolved (at least temporarily) its control issues, it typically moves into a Constructive stage where the members begin to attack their work with a new energy. This stage is characterized by a change in the attitudes and behaviors of the group members. Attempts to control decrease as listening increases. The members begin to change their preconceived ideas and opinions about each other as they listen more carefully to each other’s views. Cliques begin to dissolve and team spirit begins to build. Group identity becomes important and progress toward the group’s goals becomes evident. Participation is more even and differences are dealt with as problems to be solved

rather than as battles to be won. Boundaries become relatively closed, and new members would not be welcomed.

The final stage is represented by the step labeled Esprit. It is at this point that the members have developed the kind of rapport that brings a sense of closeness and camaraderie. The members are prepared to extend themselves for their colleagues and they really enjoy working together. The need for the structure declines and is replaced by an air of informality based on positive regard for each of the other team members. Intense group loyalty, trust, acceptance, empathy and high morale characterize this stage.

In the Esprit stage, the need for structure is reduced as the members do whatever needs to be done to satisfy both individual and group needs. Synergy is high, causing the group to achieve more than is expected or could be explained by the apparent talents of the individual members. The introduction of a new member at this stage will normally cause the group to regress to an earlier stage of development, but then progress back up the ladder fairly quickly, carrying the new member along in the process.

Since internal issues are minimal, the team members are free to devote time toward building supportive relationships with those in their task environment. The team's organizational role also becomes clearer and its contribution to the larger system increases.

The above summarizes what has been learned by those who have studied and participated in the team development process. You may find it interesting to see how the working theories you develop this week compare with this summary. It is quite possible that you will be able to make a significant contribution to increasing our understanding of the transformation of work teams into High Performing Teams.

# LEARNING JOURNAL

## SOCIAL—TEAM MATURITY

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### Teaming Skill and Learning Checklist

(Check the areas in which you excelled)

(Circle the areas you wish to improve in next session)

#### Growth Values

Empathy

Authenticity

Spontaneity

Courage

Open-Mindedness

Intuition

#### Teaming Skills

Meeting Effectiveness

Brainstorming

Problem Solving

Planning/Organizing

Decision Making

Assessing Results

Conflict Resolution

Giving Feedback

Receiving Feedback

Decisiveness

1. What did I learn most around Growth Values and Teaming Skills?

2. My personal energy and maturity impacted the team's synergy in the following ways:

3. What can I do to help our team grow through low cycles?

4. What is our team's biggest obstacle to higher performance?

5. The things I learned that I most want to be able to use back home are:

# ENVIRONMENTAL PRECESSES

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## Team Product 6

### OVERVIEW

High performance systems regularly and actively solicit feedback from their external environments and use the information to help them maintain a good “fit” between their products and services and their stakeholder’s needs and wants. Healthy relationships with the environment insure that customer needs are heard and action taken for the organization’s survival and growth. Organizations that want to become high performing need to develop effective processes for obtaining and using environmental feedback.

### PRIMARY OBJECTIVE

The purpose of this task is to have your team learn how to solicit and process feedback from your environment and use it to better satisfy environmental needs and your team’s purpose.

### EXPECTED OUTCOMES

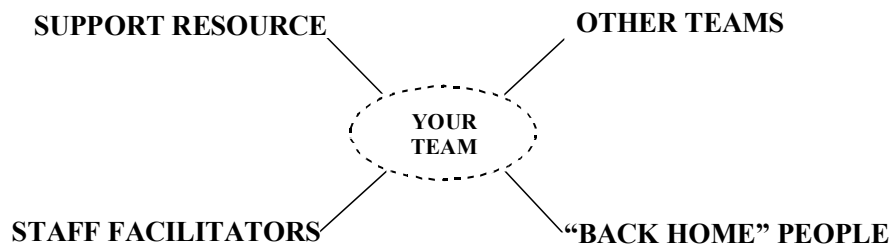
- Identification of who your team’s key stakeholders are, and determination of what demands and expectations they place on your team.
- Understanding of whether there is a balance between these environmental demands and your team’s purpose and internal processes.
- Discussion on how well your team is managing this balance by examining your activities in satisfying the external needs in conjunction with your team’s needs.
- A strategy for making the changes needed to improve this balance and your team’s ability to manage its environment.
- An overview of what you learned as a result of accomplishing this task, and a working theory to effectively understand and interact with the external environment.
- Present your learnings (your team product) in a way that helps other teams benefit from your team’s work and results.

Each team will be allotted up to 10 minutes to make their presentation. Following the presentations teams will purchase (evaluate/score) the team products according to the accountability guidelines.

## **SUGGESTIONS**

Before you begin working, reach agreement as to the objective and outcomes your team expects. Once this is done, design a process for accomplishing the objective and producing the desired outcomes. You may wish to consider the following helpful hints:

- Draw a picture depicting your team’s environment, indicating the environment’s external stakeholders.



- As a team, identify what you think the key demands and expectations are that each stakeholder has of your team.
- Evaluate how your team is responding to these external demands and what effect these responses are having on your team’s purposes and objectives.
- Devise a means to solicit feedback from your team’s key stakeholders to determine how well your team is fulfilling these demands and expectations.
- Review the guidelines for soliciting and providing feedback.
- Solicit the feedback and determine what gaps exist between what your team assumed versus what is actually expected.
- After the first solicitation, pause briefly to determine the effectiveness of your process and make whatever changes might be needed to increase its effectiveness.
- Analyze the feedback and decide what, if any, changes your team should make to better respond to the needs and expectations of your environment. Plan to make the changes needed.
- Summarize your conclusions.
- Devise a means to help other members learn from your experience.

# ENVIRONMENTAL FIT

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## Actions to Clarify and Exist in the Larger Environment

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- Identify relevant external environments: educational, economic, social, political, etc.
- Define major trends for each environment: global economy, search for quality, educational reform, etc.
- Identify key stakeholders outside your organization/team: Staff, facilitators, other teams, customers, owners, etc.
- Specify relevant demands, expectations, and needs of each key stakeholder.
- Verify stakeholder needs and expectations through visitation, questioning, discussing, etc.
- Adapt your organization/team mission and purpose for existing along with its vision for the future.
- Re-evaluate the last five core process areas your team's developed for possible revision.

# FEEDBACK PROCESSES

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## Guidelines for Increasing the Quality and Quantity of Feedback

### WHEN SOLICITING FEEDBACK

- Let the providers know what kinds of information you want – be as specific as you can.
- Avoid defensive or punishing kinds of responses.
- Show appreciation for the information.
- Ask clarifying questions so you can be certain you understand.
- Get several viewpoints. Don't rely on one source of information – others may have a different point of view.
- When you have received all the information you need, let the provider know – avoid data overload.

### WHEN PROVIDING FEEDBACK

- Supply the information that is solicited; volunteer additional information when it's requested.
- Be as specific as you can. Avoid generalities or vague statements.
- Provide first-hand information that is based on your own observations, reactions, or feelings.
- Avoid judgmental statements that are critical and will provoke defensive reactions.
- Focus on providing information that will be beneficial to the receiver, not yourself.
- Be sure the receiver understands what you are saying and is able to receive the information. Be careful not to overload the receiver with more information than he or she can handle.

# ENVIRONMENTAL SYSTEMS

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## The Organization in Harmony with its Environment Will Thrive

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No organization is an island, complete unto itself. Like any other living thing, the organization exists only in the context of its larger environment. All of the organization's needs are drawn from this environment; all of its products are returned to the environment. To recognize this is to see transparency of all rigid distinctions between "us" and "them."

The boundary that separates inside from outside is permeable and open. It is a door more than a wall; a bond, more than a barrier; a concept, more than a firm reality. Across the invisible boundary that divides them, transactions between the organization and its environment are governed by a set of natural laws.

You don't have to be a rocket scientist to understand these laws. Think of biospheres, ecology bees, and flowers. Think of organisms, rather than mechanisms. The organization and its environment are living entities, united in time and space. They are inseparable, interdependent, and mutually-creating. Like two sides of the same coin, each is required for the other's existence.

The organization exists by the "consent" of its environment. The environment, in turn, is defined and changed by the action of the organizations in it.

Purpose is the central value that unites inside with outside. The right purpose, rightly understood, radiates vitality in both directions. The organization's central purpose, and the way that purpose is pursued, must be wanted and supported by its environment.

In the pursuit of its purpose, or "core mission," the organization may identify any number of particular objectives. Many, if not all, of these will be imposed by the environment. And all of these objectives must be defined, integrated, and acted upon in ways that are both internally congruent and – externally – compatible with the environment's own many demands and needs. In short, the organization that lives in harmony with its environment will thrive; the organization that is unresponsive will wither and die.

All of this is so obvious it hardly bears repeating. It's a given. A set of basic assumptions to be taken for granted. In times of relative stability, there is no pressing need to elaborate on the required "fitness" between the organization and its environment. Not much is happening out there. So the organization's adaptive response capability goes untested.

In times of chaos and turbulence, however, the organization's very survival depends on its ability to respond quickly and well to the new environmental demands. These are such times. Consider the massive changes reshaping the face of the whole world today, and the

increasing speed, complexity and unpredictability of all these “megatrends.” Consider the impact of this tidal wave on the particular environments most relevant to your own organization and on the technological, economic, social, geographic, and other fields in which you operate. Consider, too, how vastly different are the expectations and demands of your many stakeholders now, compared with those of times past.

Customers, suppliers, lenders, owners, workers, and every other direct participant in the enterprise has shaped and been shaped by those same still-rising rivers of change. Organizations that choose to ignore these developments do so at their own risk. The pressures mount. The questions persist. Where are these new trends taking us? What kind of organizations must be designed to master these turbulent times? These are the questions that must be asked and answered by every kind of organization today – questions of adaptation and survival, transformation or decay. These are big questions, even ultimate questions. But they can be answered. Organizations are human inventions, structured and managed for the conditions of the times. They can be reinvented for new times, even for times that demand continuous adaptation.

It’s no easy task. All of the organization’s seemingly inseparable pieces must be taken apart, examined, and put back together again – refitted to a new pattern. The process begins with a careful look at the organization-environment “set” of the past, its features in the present, and the choices available for the future.

# LEARNING JOURNAL

## ENVIRONMENTAL

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### Teaming Skill and Learning Checklist

(Check the areas in which you excelled)

(Circle the areas you wish to improve in next session)

#### Growth Values

Empathy

Authenticity

Spontaneity

Courage

Open-Mindedness

Intuition

#### Teaming Skills

Meeting Effectiveness

Brainstorming

Problem Solving

Planning/Organizing

Decision Making

Assessing Results

Conflict Resolution

Giving Feedback

Receiving Feedback

Decisiveness

1. What did I learn most around Growth Values and Teaming Skills?

2. Our most important and effective response to the feedback was (or should have been)...

3. Receiving the external feedback had the following impact on the maturity of our team:

4. How should we use the “product marketing” and feedback to help us better account for our performance?

5. The things I learned that I most want to be able to use back home are:

# **SOCIAL & ORGANIZATIONAL II**

## **ROLES AND RESPONSIBILITIES**

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### **Team Product 7**

#### **OVERVIEW**

Control is never an option; either the team controls its function or others must. High performing organizations and teams develop social processes that offer and require individuals to share leadership, roles and responsibilities. Historically, we have relied on someone designated “manager” or “supervisor” to take the lead and delegate to the rest. This position was responsible for the work unit task performance and human resource maintenance. Satisfaction of these two major components requires a balance between the external environment and the organization’s individual need satisfaction processes, control processes, and producing processes. An effective team process, referred to in literature as managerial and leadership elements, requires the understanding of what needs to be done and the willingness to step-up and do it.

#### **PRIMARY OBJECTIVE**

The primary objective of this task is to help your team analyze its managerial and leadership processes, and to develop ways to increase its effectiveness

#### **EXPECTED OUTCOMES**

- together teams will purchase (evaluate/score) the team Understanding of the organizing methods your team has been utilizing to maintain focus on team purpose and outputs and the balance between individual need satisfaction processes, social processes, producing processes, and the external environment.
- A strategy that identifies needed changes to make your team’s organizing process more effective.
- Feedback on what you learned as a result of this task, and what working theory for developing effective role sharing and leadership you now employ.
- Present your learnings (your team product) in a way that helps other teams benefit from your team’s work and results.

Each team will be allotted up to 10 minutes to make their presentation. Following the presentations teams will purchase (evaluate/score) the team products according to the accountability guidelines.

## **SUGGESTIONS**

Prior to beginning work in this area, gain agreement on your objective and the outputs desired. Once you accomplish this, design your process for achieving these. The following hints may be helpful.

- Individually read the materials and then discuss with your team members the different types of organizational control processes.
- Brainstorm a list of words or phrases that describe your team's managerial and leadership processes.
- Process through the items on the list, reaching agreement on which processes in the elements of managerial and leadership your team has used. Identify who on your team has been performing these roles and activities. Reach agreement on what style was used early in the week and what style is being used now. Indicate why you have changed.
- Think through how your team has been setting objectives, planning, organizing, soliciting feedback, and measuring performance. What level of effectiveness have you attained?
- Reach consensus on who is leading or directing your team through its managerial and leadership processes. What level of effectiveness is being achieved?
- Develop a plan to implement needed changes in your processes and which working theory will govern these changes.
- Analyze your experience and develop your working theory about organizational processes and high performing systems.
- Develop a means to share your team's learning with the other workshop teams.

# UNDERSTANDING MANAGERIAL AND LEADERSHIP FUNCTIONS

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Organizations need to have methods for handling external and internal conflicts, integration needs, resource allocation, purpose, accomplishment, coordination, and continuous improvement.

These tasks can be grouped into four main categories – *producing, supporting, managing and leading*. These tasks and categories are highly interrelated and interdependent, forming task subsystems.

**Producing tasks** - These tasks directly relate to the production of an organization's products and services, such as receiving, processing, selling, delivering, operating and repairing equipment, controlling quality and costs, etc.

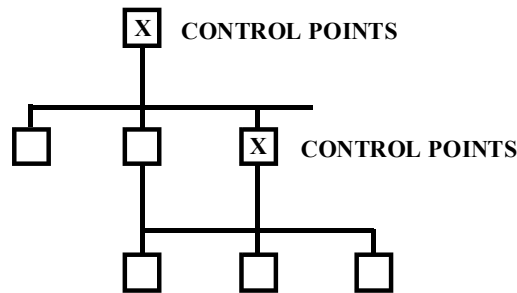
**Supporting tasks** - These are the tasks that support the production and services, such as obtaining needed resources (people, materials, information, etc.), helping design and install equipment, building facilities, and handling payroll, benefits, invoices, etc.

**Managing tasks** - These tasks help coordinate and integrate the activities of the producing and supporting subsystems with each other and congruent with the needs and expectations of the external environment. They include such things as helping establish standards for overall performance and effectiveness, helping measure and monitor the performance of the various sub-units and initiating action to solve performance deficiencies, helping resolve conflicts between the various teams and between the organization and its environment, and helping prioritize scarce organizational resources.

**Leading tasks** - Leadership is not easy to explain or readily defined. Yet a useful way to view it is the process that allows one to influence others to attain what an individual or team desires done. It is one of the functions historically assigned to the president or chief operating person at a location. The method of leadership chosen by your team will certainly influence your group's overall results, as well as individual's growth and development. Leading tasks generally relate to ensuring clarity, consensus, and commitment regarding organizational visions, purposes, and strategies, developing common values, developing supportive work cultures, looking outward and monitoring the environment to detect needs for organizational renewal and change, and initiating and leading organizational planning, change, and development of activities.

Traditional organization designs have formally assigned the control responsibilities to positions labeled manager/supervisor. High performing organizations foster processes that internalize these requirements throughout the entire system to make everyone responsible.

Most of us have read or been exposed to the classic functions of management: planning, organizing, staffing, leading and controlling. These functions have been viewed as management's prerogative because of how organizations are classically designed. Organizations were designed in layers to isolate control points. These control points were where these management functions were focused. The following model represents this.



Organizations and teams develop different influence methods to accomplish these management functions. In the classical organization, the formal leader may use position power as a means to accomplish the task by using rewards, coercive power or legitimate power. Outside this, both formal leaders and informal leaders can use personal power through expert and referent power. Expert power is the ability to control another's behavior through possession of a special knowledge, skill, or ability that the other person does not have but needs. Referent power is the ability to control another's behavior because of their need to identify and be accepted by the power source.

There are many ways to exert influence and control. The most common are:

- Reason.** Using facts and data to support a logical argument.
- Friendliness.** Using flattery, goodwill and favorable impressions.
- Coalition.** Using relationships with other people.
- Bargaining.** Using the exchange of benefits as a basis for negotiation.
- Assertiveness.** Using a direct and forceful personal approach.
- Higher authority.** Gaining higher-level support for one's requests.
- Sanctions.** Using organizationally derived rewards and punishments.

Source: Schermerhorn, Hunt, Osborn, Managing Organizational Behavior, Third Edition, p. 456.

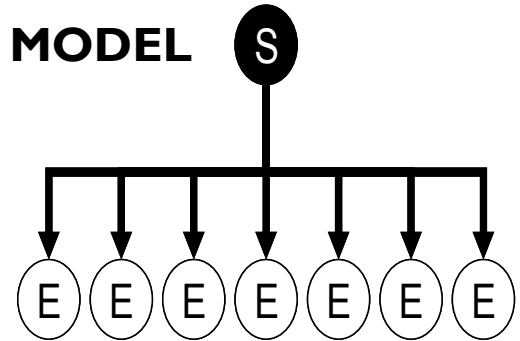
# ORGANIZATIONAL MODELS

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## Moving from Traditional to Shared Control

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### TRADITIONAL SUPERVISORY MODEL



#### ACCOUNTABILITY

- Supervisor is accountable for workers output
- Supervisor sets schedules, orders materials, reports performance
- Supervisor directs and controls workers
- Supervisor is responsible for quality and quantity of output

#### COMMUNICATION

- Supervisor talks to individual workers, one on one
- Minimal interaction between workers
- One-way feedback, supervisor to worker

#### TECHNICAL SKILLS

- Supervisor possesses technical knowledge
- Supervisor solves technical problems
- Supervisor makes decisions
- Supervisor trains
- Supervisor sometimes works

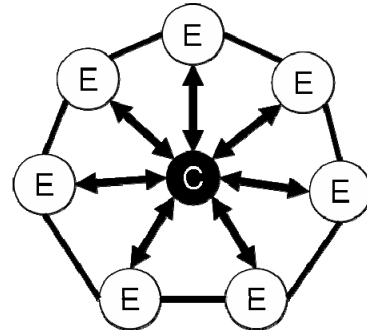
#### SOCIAL SKILLS

- Supervisor is responsible for morale and motivation
- Behavior outside a tight tolerance is punished

#### ROLE OF WORK GROUP

- Follow the Supervisor's direction
- Comply with specific rules
- Operate within a specific job description
- Minimize variances
- Stay busy or look busy

## TEAM LEADER MODEL



### ACCOUNTABILITY

- Leader is accountable for performance, but does delegate some responsibility to key members
- Leader is responsible for quantity and quality of output
- Leader makes most decisions

### COMMUNICATION

- Some interaction between members
- Leader shares information about the business with the team
- Leader manages dynamics of member relationships
- Leader solicits team members' ideas

### TECHNICAL SKILLS

- Technical skills are shared between leader and members
- Members become skilled in more than one area
- Members provide input into technical decisions

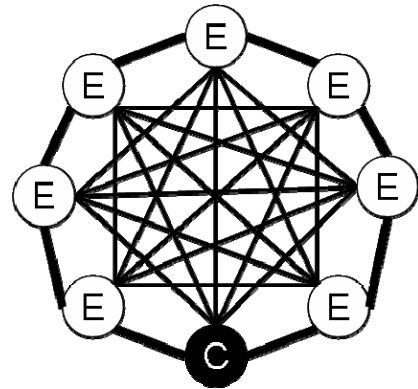
### SOCIAL SKILLS

- Leader facilitates information sharing & discussions
- Group norms emerge
- Some diversity of ideas is encouraged

### ROLE OF WORK GROUP

- Comply to group standards
- Help in solving material, maintenance and production problems
- Members can influence work environment

## TEAM COORDINATOR MODEL



### ACCOUNTABILITY

- Team owns their piece of the business and monitors performance
- Coordinator reviews results of the team
- Team is fully accountable for mutually developed goals
- Leadership is shared and situational

### COMMUNICATION

- Highly interactive
- Coordinator is occasionally used to manage group dynamics
- Two-way feedback is valued

### TECHNICAL SKILLS

- Members are developed to manage training, safety, maintenance
- Members exercise considerable judgment and discretion
- Members manage specialists when needed

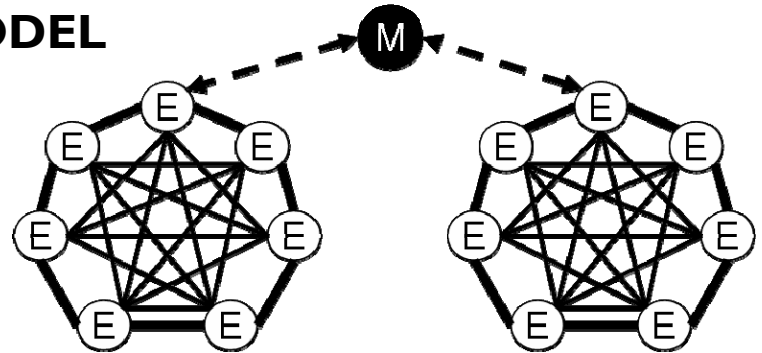
### SOCIAL SKILLS

- Members help each other become better contributors
- Members appropriately challenge each other
- Diversity is valued
- Coordinator coaches to increase team development

### ROLE OF WORK GROUP

- Enroll in the culture of the organization
- Contribute to the success of the plant
- Continually solve variances
- Coordinator manages boundaries
- Coordinator focuses on long range

## SELF-MANAGING MODEL



### ACCOUNTABILITY

- Team manages and improves value-added
- Team resource is a consultant to more than one team as needed and provides specific expertise when requested
- Resource provides feedback from the external environment
- Team allocates resources to new business opportunities
- Team manages all seven core processes

### COMMUNICATION

- Members highly interact with external environment (vendors, customers, corporate, consumers)
- Two-way feedback is actively and frequently solicited
- Continuous improvement is a way of life

### TECHNICAL SKILLS

- Members stay abreast of technical trends
- Team possesses all the resources to maintain and improve value-added
- Team monitors what future skills they may need

### SOCIAL SKILLS

- Team owns the social system and regulates its own behavior
- Members value each other's unique contributions
- Diversity of ideas is encouraged

### ROLE OF WORK GROUP

- Improve the work system continuously
- Members are empowered to create their future
- Members transcend individual needs to the success of the business
- Team focuses on what's right for the whole

# LEARNING JOURNAL

## ORGANIZATIONAL ROLES

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### Teaming Skill and Learning Checklist

(Check the areas in which you excelled)  
(Circle the areas you wish to improve in next session)

#### Growth Values

Empathy

Authenticity

Spontaneity

Courage

Open-Mindedness

Intuition

#### Teaming Skills

Meeting Effectiveness

Brainstorming

Problem Solving

Planning/Organizing

Decision Making

Assessing Results

Conflict Resolution

Giving Feedback

Receiving Feedback

Decisiveness

1. What did I learn most around Growth Values and Teaming Skills?

2. We have learned to address and resolve conflicts by:

3. Our organizational roles should:

4. I personally gained the following insights about my ability to work role and responsibility issues within a team:

5. The things I learned that I most want to be able to use back home are:

# FEEDBACK PROCESSES

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## Team Product 8

### OVERVIEW

We know we need it; yet, mostly, we avoid it. It's called Feedback. What we have learned is that it's mostly negative, can be painful, and yet is a key to helping us choose change. High performing people, teams and organizations are dependent on it for growth and survival. We all need feedback, and we all need to learn how to share in order to create awareness. It is through awareness that alternatives can be discovered and applied. For our teams to grow, each must take responsibility for sharing and receiving feedback on how our behaviors either help or hinder other team members and the team's producing and social processes.

### PRIMARY OBJECTIVE

You and your team are to learn effective supportive ways of sharing and receiving interpersonal feedback and how, based on this information, we can improve individual and team effectiveness.

### EXPECTED OUTCOMES

- Awareness of what constitutes feedback and how to provide it in a supporting way.
- Increased understanding of team member views and how our behavior affects performance.
- A process that provides a method for both providing and hearing individual feedback within the team.
- A working theory on feedback.
- Present your learnings (your team product) in a way that helps other teams benefit from your team's work and results.

Each team will be allotted up to 10 minutes to make their presentation. Following the presentations teams will purchase (evaluate/score) the team products according to the accountability guidelines.

## **SUGGESTIONS**

As before, reach agreement on your team's objective and desired outputs of this task. Once agreement is reached, design a process that will allow your team to attain the objective and desired outputs. The following will be helpful.

- Read the article in this section entitled “How to Learn From Your Own Experience.” Pay particular attention to items I through II.
- The “Team Development Grid” is one vehicle for providing and receiving feedback. Each team member can duplicate the “more of, less of, keep” on a flip chart pad, starting by listing what they feel they need to do more of, less of, or keep. Then, all members can post theirs on the wall, asking others to add to theirs.
- Follow these guidelines when sharing your feedback charts.
  - a) Feedback receivers should only be allowed to ask clarifying questions - such as, “Could you explain that more?”
  - b) Paraphrase in your own words what you have heard at the end of your feedback to the team.
  - c) Thank the group for the feedback.
  - d) At this point, you may give whatever thoughts or insights that come to mind. It is a perfect opportunity to self-disclose or declare what actions you might take.
  - e) After the first couple of rounds, check the effectiveness of your process and make whatever changes are needed.
- Analyze your team's experience and develop a way to share your group's learning with the other teams.

# TEAM DEVELOPMENT GRID

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For: \_\_\_\_\_

(Name)

**Instructions:** Have each team member complete one of these sheets. Then post and ask each team member to contribute their thoughts. Use behavior-descriptive language only. You may, if you wish, ask for the facilitator’s help in wording your thoughts. Complete one of these sheets for each of the team members present.

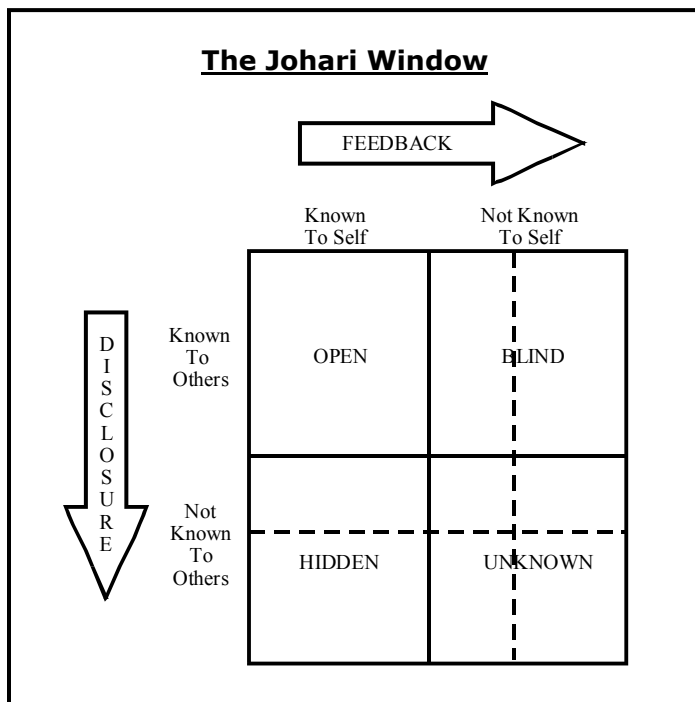
*Behavior description examples:* “Keep asking for clarification when the group does something that’s not clear to you.” Or, “Stop joking with Les (?) while the group is working on serious business.” Do *not* use evaluative, emotional-laden or vague language about “attitudes” or feelings. (Do *not* say: “Be more sensitive,” or “Keep being yourself,” or “stop feeling paranoid.”)

START	STOP	KEEP

I will:

# HOW TO LEARN FROM YOUR OWN EXPERIENCE

What is it to be an open person, or to have an open relationship? The Johari Window provides a graphic way of looking at personal and interpersonal openness.



The window represents your whole person.

The “open” area includes that part of you – your behavior, feelings and thoughts—which you share freely with others. When you form a new relationship, this area tends to be small. What you share with a new acquaintance is governed largely by social convention and limited to things that are public knowledge anyway. As you get to know and trust another, you are both willing to share more of yourselves and the open areas grow in size.

The “blind” area includes behavior you are not aware of, although another may be. “Would that God the gift would give us, to see

ourselves as others see us.” You find out about your blind area through feedback from others.

The “hidden” area includes thoughts and feelings that you have not yet revealed to others through your behavior. You share your hidden area by self-disclosure.

The “unknown” area is that part of you which you once knew and have forgotten, or which you have not yet discovered. What helps you to probe into your unknown is experiment and play. Small children are experts at self-discovery, simply because they are experts at play. As people grow older, they often tend to lose their capacity to play, to test, to experiment, to fool around.

In this context, being “open” focuses on behavior (words and actions) and reactions to behavior (understanding and feelings). When you communicate freely with another about your behavior, perceptions and feelings, you are being open. When you are evasive, defensive, reserved or silent about them, you are not being open.

You can use the window to look at yourself, to help you to understand how open you are and what growth in openness means. You can also use it to look at different kinds of relationships one to one, one to group and group to group.

For example, assume that the window describes the relationship between you and someone else in the group with which you are now working. The four quadrants represent the total relationship. The relationship is defined by two points of view, your own and that of the other person. The quadrant of the window that describes which is actually shared in your relationship is the “open.” Your relationship develops and grows beyond what it now is when you both move into the “blind,” the “hidden” and the “unknown,” and become more open within yourselves and to each other. The broken line in the diagram represents potential growth in openness.

Enlarging your area of openness by reducing the hidden, the blind and the unknown, is always a little risky. There is risk to you and risk to the other. Will you hurt him? Will you make him angry? Will he reject you? What will he think about you? What will you find out about yourself? The risk, the pain and the fear of being open can be strong deterrents. When is openness worth it? When is it possible? When is it constructive?

Attention to the following points increases the probability that openness will improve a relationship rather than harm it.

1. There must be a good reason for being open. Openness must have a purpose beyond itself. You are open because you care enough about improving a relationship to make it worth the effort. If a certain measure of caring does not come across in your attempts to be open, you may well be perceived as meddling, manipulative, threatening, aggressive or even hostile.
2. Openness is not an absolute value. It is not always possible or even desirable. It must be put into a context of sensitive responsiveness to the other. It must serve not only your needs, but the needs of others.
3. Openness involves risk-taking. There is always the possibility of rejection, anger, new and frightening knowledge, being hurt. The risk is on both sides. It is important to remember that when you risk and initiate openness, the other person may be running an even greater risk by being open in return. He has many safer options: to evade, to flee, to be defensive, to attack, to be silent. When you offer your openness, he can back off. When he accepts your openness, you are both committed.
4. Realize that openness is sharing and that it is a contradiction to thrust openness on another. The other has to be willing to be open with you. Otherwise, openness becomes coercive.
5. Defenses are not all bad. We need them from time to time. Being open should never be an excuse to strip another of his defenses. Openness should build trust to the point where another feels safe enough to be able to drop his defenses of his own accord.

6. Openness means facing and accepting yourself. It means owning your thoughts, feelings and behavior and being responsible for them, and responsible for changing them, or not.
7. Openness means accepting the thoughts, feelings and behavior of the other as facts, and letting him or her be responsible for them, and responsible for changing them or not.
8. The aim of openness is not to change the other, but to share an understanding of your relationship. It helps you to know how you perceive each other's intentions and behavior, and how you feel about each other's actions. This awareness of each other should open up new behavioral alternatives. The change that grows out of openness should be self-determined.
9. Being open is not the same as being "personal." Revealing a lot of personal details about your past can be a defensive substitute for dealing with here and now behavior, thoughts and feelings.
10. There are a number of simple communication skills that are useful in trying to be open. These skills can be acquired by attention and practice. It is usually more helpful if you...
  - separate behavior from feelings
    - Less helpful: "You jerk!" (an accusation)
    - More helpful: "What you just said (your behavior) made me very angry (my feeling reaction)."
  - are descriptive of behavior rather than evaluative or judgmental of the person
  - are specific rather than general
  - separate thoughts from feelings
    - "I think that this is a good idea, but I feel very threatened by it."
  - let the other draw his or her own conclusions
  - state the other's idea in your own words to check out if you have properly understood. This is called paraphrasing.
  - are provisional rather than absolute.
11. Giving and getting feedback plays a key role in being open. Feedback is a way of seeing the impact on another of what you say or do. Feedback on your behavior, on how you come across, can help you to consider some alternative ways of behaving. If it is not given constructively, it can just encourage defensiveness, or simply be destructive.

Feedback is constructive if...

- it is asked for rather than imposed.
- it is well timed. Feedback is most often useful when it is given immediately after the behavior in question. Sometimes it is better to wait, especially if the recipient is angry, confused, upset, or defensive, and not inclined to listen.
- it is not saved up and dumped all at once. This is usually accompanied by a build-up of feeling which is hard to sort out from the message.
- it is checked to insure accurate, clear communication.
- it is checked for validity against the perceptions of others.
- it is intended to be helpful to the recipient. It meets his needs, rather than the needs of the one giving the feedback.
- it leaves the recipient free to do with it what he wants, to change or not as he chooses.
- it is specific rather than general. Examples of exact statements and behavior are most useful.
- it simply describes the recipient's behavior and its impact on others, without making any judgments about what he is as a person.
- it is given in a climate of trust, with a feeling of caring and support.
- it focuses on things the recipient can do something about.
- negative feedback is preceded by positive feedback. This helps give support.
- it is received non-defensively. A good rule of thumb is to ask only clarifying questions when receiving feedback.
- the recipient has a chance to say what he thinks and feels about the feedback when it is all over. This can lead to a better understanding of why he behaves the way he does.

# JOHARI WINDOW

## Self-Rating Sheet

→ SOLICITS FEEDBACK →

	1	2	3	4	5	6	7	8	9
Never asks for feedback-no information about self solicited									
More closed than open									
Open and closed equally									
More open than closed									
Always asks for feedback-wants to know how others see him									

Never gives feedback group doesn't know how he sees them or where he stands

More closed than open

Open and closed equally

More open than closed

Always gives feedback Lets group know how he sees them and where he stands

SELF DISCLOSURE OR EXPOSURE

# LEARNING JOURNAL

## FEEDBACK PROCESSES

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### Teaming Skill and Learning Checklist

(Check the areas in which you excelled)  
(Circle the areas you wish to improve in next session)

#### Growth Values

Empathy

Authenticity

Spontaneity

Courage

Open-Mindedness

Intuition

#### Teaming Skills

Meeting Effectiveness

Brainstorming

Problem Solving

Planning/Organizing

Decision Making

Assessing Results

Conflict Resolution

Giving Feedback

Receiving Feedback

Decisiveness

1. What did I learn most around Growth Values and Teaming Skills?

2. I can use the feedback I received to be more effective by...

3. As I gave feedback to other members of our team, I felt...

4. The difference between giving feedback and having a process to give and receive feedback is that...

5. The things I learned that I most want to be able to use back home are:

# SYSTEMS THEORY

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## Team Product 9

### OVERVIEW

To remain profitable and competitive, high performance work systems place a high priority on producing products and services which are of high value to their customers and clients. These products and services are the result of well-designed, efficient processes. These seven core process designs make good use of all available resources – people, equipment, facilities, money, and information.

Throughout the week, each team has been building, exploring, and stretching to understand the 7 key elements of effective systems. Now it is time to take those 7 parts and build an overview of your experience this week. You created a complete system out of what was originally just some "people" who met together here. That is something truly unique – something that deserves to be recognized and demonstrated. What made your team work? How did the processes fit for you? What learnings will you take with you to the next team you have a chance to bring together, and what learnings do you wish to avoid? This product is your summary – to tell your story, act your part, and demonstrate how the people and the system came together.

### PRIMARY OBJECTIVE

The primary purpose of this task is to provide an opportunity for you to learn from your week's experience how the 7 core processes are integrated and ways of developing plans for producing and marketing team products and/or services that reflect your team's learning during this Workshop.

### EXPECTED OUTCOMES

- A team product/presentation that meets the following specifications:
  - a) Accurately reflect all significant learnings during the week within the scope of the workshop objectives.
  - b) Be judged as having value for your market, which is the other teams and staff.
  - c) Develop and produce it within the framework and constraints of the Workshop environment.
  - d) It can be delivered to your customers (the other members of the Workshop) in a time frame that lasts between 15-20 minutes.



# GLOSSARY

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## Systems Terminology and Definition

**Boundary** - An imaginary region or line that separates a system and its component parts from its environment.

**Control processes** - Activities that regulate, integrate, and coordinate the various internal parts of elements within a system, and between the system and its environment.

**Core process** - That conversion process that is central to the accomplishment of the primary task of the system.

**Environment** - Everything outside the system's boundaries. A system's environment is that portion of its environment with which it must interact to accomplish its purpose.

**Equifinality** - All living systems have the ability to reach the same end points through a variety of paths. There is not necessarily any one best way to accomplish a given purpose, objective, or task, although some ways are better than others.

**Feedback** - Information that lets a system and its members know whether or not it is pursuing the right goals or is on track toward meeting its goals.

**Inputs (intakes, imports)** - Whatever enters the system from its environment—materials, information, energy, etc.

**Living systems** - These are systems which have the capacity to regulate their own activities in the pursuit of purposes and goals.

**Open systems** - These are systems whose survival depends upon regular interchange and interdependence with its environments.

**Outcomes, outputs** - The results of the activities of a system; everything that is exported from a system into its environment to fulfill a need.

**Permeability** - The degree of openness of a system's boundary to inputs from its environment.

**Primary task** - That task which is central to the accomplishment of the primary purpose of the system.

**Producing Systems** - Systems that are directly involved in converting or transforming into outputs.

**Purpose** - A systems reason for existence.

**Renewal** - The activities required to maintain a good fit between the elements of a system, or between the system and its external environment.

**Social process** - The interactions and relationships between the members of a social system.

**Social system** - The relationships between a set of persons who are interdependent with respect to some common output or outcome.

**Socio-technical system** - Any system whose purpose must be achieved through the joint optimization of both a social and a technical system.

**Steady (stable) state** - The tendency of all living systems to maintain an orderly balance among their component variables, as well as with their task environments.

**Stress, strain, and threat** - External demands constitute *stresses* on a system, which in turn cause *strains* within a system. *Threats* are anticipated stresses.

**Structure** - The arrangement of the sub-systems and components within a system at a given moment in time.

**Support systems** - An individual or group whose primary purposes are to support the producing (operating) sub-systems.

**System** - A collection or set of interdependent elements which interact with each other to achieve a purpose.

**Task system** - The human activities and physical resources required to convert a system's inputs into its outputs.

**Technical system** - Transformation or conversion of inputs into outputs.

**Technology** - Procedures, machines, methods, knowledge, and techniques for accomplishing outputs.

**Transformation** - An alteration or change in the state of the throughput of the system, or of the system itself.

–Adapted From Herb Stokes