PHASE 1 – ORIENTATION

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Phase 1 Evaluation

*The entire contents for Phase 1 are shown here, but only the Overview is included in this sample file.
TEAM LAUNCH SYSTEM

PHASE 1 ORIENTATION → PHASE 2 ORGANIZATION → PHASE 3 ACTION → PHASE 4 RESULTS

1 Week

PHASE 1 – ORIENTATION (1 Week)

Milestone 1 TEAM LAUNCH
1 TEAM ASSIGNMENTS
2 TEAM ADMINISTRATION
3 TEAM MEMBER PREPARATION
4 FIRST MEETING – INTRODUCTIONS

Milestone 2 BUSINESS ANALYSIS
1 MARKET ANALYSIS
2 STRATEGIC ANALYSIS
3 COMPPELLING BUSINESS REASON

Milestone 3 ORGANIZATIONAL ANALYSIS
1 KEY STAKEHOLDER IDENTIFICATION
2 COST/BENEFIT ANALYSIS
3 FORCE FIELD ANALYSIS

Milestone 4 SITUATIONAL ANALYSIS
1 IMPORTANCE
2 URGENCY
3 TEAM DYNAMICS
4 PROBABILITY OF SUCCESS

DELIVERABLES
- Business Analysis Summary
- Organizational Analysis Summary
- Situational Analysis Summary
Phase 1 Overview

The goal of Phase 1 is to create a common orientation among all team members on the business, the organization, and the situation among team members.

Teams start out as a collection of individuals, each with different information and a unique perspective. Therefore, the first task of the team is to merge members’ information and perspectives to create a common orientation, where everyone knows what everyone else knows about anything that is relevant to the team.

The team will also need to reach outside the team to bring in additional information that no team members possess in the beginning.
WHY

At this point the team situation is much like a jig saw puzzle where each team member has different pieces of the puzzle, some pieces of the puzzle are missing, and no one has a picture of what the final puzzle should look like. Therefore the first thing the team must do is to get everyone to put their pieces of the puzzle on the table and find out who has the other pieces the team will need to solve the puzzle.

The term “common orientation” is used here to emphasize that the team does not need to reach agreement or consensus at this stage of development. Team members may have different perspectives, opinions, or interpretations of the information that is shared. The task at this point is to ensure that all of the different perspectives are understood. This ensures the team has the best overall view of the situation from as many different perspectives as possible. This dramatically increases the likelihood of the team solving the team puzzle, right!

There are three areas where the team must create a common orientation – to the business, the organization, and the situation. By creating this common orientation, team members will be able to answer two very important questions that will determine their level of motivation and commitment to the team:

- Why are we doing this?
- What’s in it for me?

BUSINESS ANALYSIS

Creating a common orientation to the business empowers a team to do the “right thing for the business” and be self-directed in their actions. The team will encounter numerous conflicts between what is the right thing to do for different functions on the same issue. The role of the team is to bring a business perspective to these conflicts to ensure the organization does the right thing for the business.

ORGANIZATIONAL ANALYSIS

Creating a common orientation to the organization identifies the organizational dynamics that will support and inhibit team performance and actions. Understanding the counter-balancing driving and restraining forces within the organization’s culture and infrastructure gives a clear indication of the level of effort that will be required for the team to achieve success.

Creating a common orientation to the organization also identifies the key stakeholders from outside the team who will experience the costs and benefits of team actions. These are the individuals and functions with which the team will have to develop a collaborative work relationship in order to achieve success.
The information generated in the business and organizational analyses allows the team to get an accurate assessment of the situation the team is in. Creating a common orientation on the importance of the team being successful, the urgency with which the team must take action, and the probability of the team being successful, ensures the team has an accurate understanding of its situation.

Creating a common orientation to the strengths and weaknesses of the team’s dynamics allows the team to understand if the team has the ability to achieve success. In particular the team must understand whether they have the necessary personal acceptance, professional respect, and work relationships to establish the level of trust and personal risk-taking necessary for the team to be successful.
WHAT

The following milestones must be accomplished to move the team through Phase 1. Larger, more complex teams may have to schedule several meeting to work through these four milestones. Smaller, less complex teams may be able to accomplish all four milestones in a single meeting. Therefore the judgment of the team leader on the time required to move through Phase 1 will be critical to team success.

MILESTONE 1 – TEAM LAUNCH

To achieve this milestone, management must identify team members and ensure that they participate in the Team Launch Process. The team leader must prepare team members to actively participate in the first team meeting. This gives the team a “running start” and establishes an action orientation for the development of a high performance team.

- Task 1 – Team Assignments
- Task 2 – Team Administration
- Task 3 – Team Member Preparation
- Task 4 – First Meeting – Introductions

MILESTONE 2 – BUSINESS ANALYSIS

To achieve this milestone, the team must establish a common orientation to the business. This will empower the team to be self-directed in their actions and to do the right thing for the business. This analysis will help the team predict the level of priority, power, influence, and support the team will receive.

- Task 1 – Market Analysis
- Task 2 – Strategic Analysis
- Task 3 – Compelling Business Reason

MILESTONE 3 – ORGANIZATIONAL ANALYSIS

To achieve this milestone, the team must establish a common orientation to the organization. This will identify key stakeholders in team actions, the costs and benefits that flow to each key stakeholder, and the organizational support and inhibitors to team success.

- Task 1 – Key Stakeholder Identification
- Task 2 – Cost & Benefit Analysis
- Task 3 – Force Field Analysis

MILESTONE 4 – SITUATIONAL ANALYSIS

To achieve this milestone, the team must establish a common orientation to the situation. This will determine the importance of the team to the organization, the urgency with which the team must take action, the strengths and weaknesses in team dynamics, and the probability of the team achieving success.
| Task 1 – Importance | Task 2 – Urgency | Task 3 – Team Dynamics | Task 4 – Probability of Success |
DELIVERABLES

At the end of Phase 1 the following deliverables must be documented and presented to the team’s designated “champions” (or designated management) for review and approval. This ensures that teams and management have the same understanding of the business, the same understanding of the organizational dynamics the team will encounter, and the same assessment of the situation the team is in.

- Business Analysis
- Organizational Analysis
- Situational Analysis

BUSINESS ANALYSIS

A summary of the team’s market analysis, strategic analysis, and compelling business reason.

ORGANIZATIONAL ANALYSIS

A summary of the key stakeholders in the team, the costs and benefits to each key stakeholder, and a force field analysis of the organizational dynamics the team will likely experience.

SITUATIONAL ANALYSIS

A summary of the team’s view of the importance of the team to the organization, the urgency with which the team must act, the probability of the team achieving success, and an assessment of the team’s ability (team dynamics) to achieve success.

DOCUMENTATION

These deliverables must be produced in written form and submitted to the team champion and/or functional management upon completion of Phase 1. It is the team leader’s responsibility to have this written up and distributed.

Because of the complexity of the team situation, the team will have to return to these analyses at different points in its development. Documentation allows the team to recall what it has done and creates a history of team thinking that can be used to understand any changes that develop later in the team development process.

Documentation will also be used to orient new team members, should changes in team membership occur. New members can review this documentation to orient themselves to the team. To complete the orientation, the team can review the documentation to identify additions, deletions, or changes in information and thinking. The level of documentation required will vary by team, and will require a judgment call on the part of the team leader. A general guideline is, the more complex and important the team is, the more documentation will be required.
INVESTMENT

The time taken to achieve the milestones and tasks in Phase 1 will vary greatly across teams. Teams that are less complex may be able to accomplish these milestones in a few hours. Most new product development teams, business teams, and major project teams can accomplish this in approximately two days over the period of one week by using the recommended processes in the Team Launch System.
RETURN ON INVESTMENT

The return on the team’s investment in Phase 1 is:

1. A common understanding of what they are getting themselves into.
2. A common understanding of the level of power, influence, and support the team will have within the organization.
3. An accurate assessment of the level of investment the team should make in its team dynamics in order to give itself the ability to succeed.
4. An accurate assessment of the level of investment the team should make in the next phase of team development.
5. An accurate understanding of the compelling business reason for the team’s existence.
6. An accurate understanding of the organizational dynamics that will support and inhibit team performance.
7. An accurate understanding of the team’s importance, the urgency for action, and the probability of success.
8. This understanding allows the team to answer three central questions that directly affect team member motivation and commitment to the team:
   a. Why are we doing this?
   b. What level of power, influence and support will we have?
   c. What’s in it for me if I make the investment of time and energy to this team?

Based on the answers to these questions, the team can determine the level of investment they will need to make in Phase 2 – Organization. Teams that are complex, have a strong compelling business reason, and are high in importance and urgency will justify more investment of time and effort that those that are not.
KEY SUCCESS FACTORS FOR PHASE 1

All but one of the tasks the team must accomplish in Phase 1 are at the group level of team interaction. The dominant process that the team will use is discussion to create shared understanding about the business, organization, and situation. In order for these discussions to be successful, they must be marked by openness, honesty, and balanced participation. To achieve this will require strong personal and interpersonal dynamics.

Therefore the Key Success Factors for Phase 1 focus on the personal and interpersonal team dynamics:

- Establish personal acceptance and professional respect
- Establish strong work relationships
- Create shared understanding
- Obtain balanced participation
- Maximize asynchronous activities
- Make the necessary investment

ESTABLISH PERSONAL ACCEPTANCE AND PROFESSIONAL RESPECT

High levels of personal acceptance and professional respect are necessary for team members to be open in their communications and to avoid unproductive conflicts over personality and style. These personal conflicts, if not quickly resolved, will start a downward spiral in team dynamics. These conflicts soon damage relationships between team members, that in turn reduces trust, which in turn results in other team members being forced to choose up sides between the individuals involved, which results in a breakdown in communications.

A lack of personal acceptance and professional respect creates a high level of personal risk for team members that often results in polite and superficial communications. This makes it extremely difficult for the team to sort out critical issues, identify hidden agendas, and accurately assess the level of politics involved in the situation. Going back to our earlier analogy of a jigsaw puzzle, the team does not get all the pieces and does not know what the final picture even looks like. This is a formula for low performance.

Therefore, a key success factor for Phase 1 is establishing levels of personal acceptance and professional respect that will minimize conflicts over personality and style while maximizing the building of strong work relationships among all team members. In some cases, the team may be faced with a situation where personality conflicts already exist between team members. These will need to be resolved before they can damage team dynamics.
ESTABLISH STRONG WORK RELATIONSHIPS

High quality work relationships are necessary to establish a level of trust that encourages team members to take the personal risks to be open and honest with each other.

Without high levels of trust, team members are often polite and superficial in their communications. For example, a team member may believe that sharing that a boss is opposed to the team (because it will take resources from other functional priorities) is too risky. If the member shares this, and it gets back to the boss, this person may find himself or herself in trouble. Thus the person may only suggest that there “may be a lack of management support.” This polite and superficial response will be of little help to the team.

Therefore, a key success factor for Phase 1 is establishing strong work relationships that create the level of trust necessary for individual team members to take personal risks with each other. Teams that inherit damaged relationships between team members will have to ensure these relationships are repaired before they can damage team dynamics.

CREATE SHARED UNDERSTANDING

The dominate group process in Phase 1 is discussion. If these discussions are to be fruitful they must result in a shared understanding about the issues among all team members. In this environment, listening is the power position for all team members and should dominate the discussions.

Unproductive communication techniques, such as arguing over opinions instead of trying to understand different perspectives, do not create shared understanding. Instead, they often leave team members feeling personally attacked and can easily create a downward spiral that damages work relationships and destroys personal acceptance and respect.

For example, two team members (A and B) begin to argue over whose opinion is right. A gathers anecdotal facts to support his position, and B gathers anecdotal facts to support her position. (There are always anecdotal facts to support almost any position in business situations.) Next, A gathers anecdotal facts that undermine B’s position. B now feels that her credibility is being attacked by A (who is manipulating the data to make them look bad), so B in turn presents anecdotal information to undermine A.

When A and B realize they cannot win the argument through anecdotal information, they turn for support to other team members. Those who like and agree with A will support him, and those who like and agree with B will support her. Soon those in the middle must either chose up sides, or pull back from the argument.
At this point the team dynamics have been sufficiently damaged that the team can no longer operate efficiently and effectively.

The entire scenario described above can be avoided if A and B were focused on understanding their differences rather than arguing over them. Both missed the central point of Phase 1 discussions – people have different opinions because they have different information and/or they interpret that information differently. Therefore a key success factor for Phase 1 is the ability of team members to use active listening to understand the information and logic behind differences of opinion.

**Obtain Balanced Participation**

The level of ownership and commitment to the team among team members is directly related to their level of participation in the teambuilding process. High levels of participation create ownership because team members can influence the final outcome. Influencing the final outcome creates commitment because team members are now implementing their own ideas and decisions, not management’s or the team leader’s. Therefore, the more balanced participation is among team members, the more ownership and commitment there will be across the team.

Because there are no roles or rules yet within the team, discussions often quickly become dominated by the personality and style of individual team members. This is especially true when team discussions consistently take place in the large group.

Large group discussions are often characterized by several people speaking at once, people jumping from one topic to another before discussion is finished, and people getting into disagreements with each other because there is not time to understand. This situation creates a “bid for power and control” among team members. Those with strong personalities and who are higher risk-takers will jump into the discussion and take control to get their ideas across and to counter ideas they disagree with.

Those who have weaker personalities and are less inclined to take risks will tend to pull back from this bid for power and control and become observers. Not because they are necessarily afraid, but more because they realize it is simply unproductive and is bound to result in damaged relationships – in other words, it is just not worth the time and effort.

Over time this will result in the group breaking into two subgroups: those who speak up and those who do not. The former group will be seen as “dominating” team interaction and unrepresentative of the entire team. Those in the latter group will be seen as playing it close to the vest and, therefore, political (they
Phase 1 Overview

Key Success Factors for Phase 1

want to see which way the wind is blowing before they take a position) and non-team players because they refuse to get engaged.

Inevitably the situation described above will lead to unproductive conflicts that result in personal attacks and damaged relationships. Therefore it is critical that the team leader organize the discussion and closely facilitate interactions to achieve balanced participation across all team members.

The goal of Phase 1 is to create a common orientation among team members and the dominate process will be group discussions. These discussions can take a great deal of time (on a 9-member team, a discussion in which each person has only 10 minutes of talk time will take 1 1/2 hours!), at a time when the team is under extreme pressure to move quickly and achieve results. Therefore the team must ensure these discussions are extremely efficient and effective to maximize the use of the limited time available to the team.

One of the great time wasters for a team is to do things in a group setting (synchronously) that are best done individually (asynchronously). Two of the biggest time wasters in this regard are presenting initial information and gathering initial thoughts. So sending out the market analysis information, for example, prior to the team meeting allows team members to digest the information at their own pace, and allows them to prepare for more substantive discussions in the next team meeting.

The team leader needs to be aware that teams operate both synchronously (all together at the same time in a meeting) and asynchronously (individually at each member’s own pace). To the degree that the team leader can accomplish as much as possible asynchronously, he or she can make team meetings more productive. Sharing as much information as possible outside team meetings allows team members time to absorb the information and form their thoughts and reactions. During the meetings the team can focus on higher level discussions instead of absorbing initial information.

Phase 1 requires a significant investment of time for team members to prepare for team meetings and to participate in small and large group discussions. It may require even greater time if work needs to be done to establish personal acceptance and build work relationships.

If a team fails to make the necessary investment, performance will go down, productivity will drop, and results will be minimized. In
short, the team will return less and less the more time it spends working. If the team makes unnecessary investments (e.g. working on building relationships when they are already sufficient) performance and productivity again go down as time is wasted in activities that are already a team strength. Therefore a key success factor for the team will be the ability to make the right level of investment to achieve the necessary level of performance.