TEAM MANAGEMENT

VUSSC

Course Name: Team Management
Course Author: Roger Powley, CD PhD
Commonwealth of Learning
Edition 1.0

Commonwealth of Learning
4710 Kingsway, Suite 2500
Burnaby, British Columbia
Canada V5H 4M2
Telephone: +1 604 775 8200
Fax: +1 604 775 8210
Web: www.col.org
E-mail: info@col.org

VUSSC

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Working in Groups and Teams.

The original OER courseware is available from the LearningSpace site at: http://openlearn.open.ac.uk/.

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COURSE OVERVIEW

Introduction

The Team Management course will prepare future entrepreneurs to effectively form, motivate and manage business teams to achieve the vision and business goals of the new venture.

Course Goals

Upon completion of this course future entrepreneurs will be able to:

1. Describe the roles and responsibilities of the team leader.
2. Explain the concepts and principles of managing and leading business teams.
3. Organize and manage business teams.
4. Consider the issues that impact members of a business team.
5. Motivate and inspire team members.
6. Resolve team conflict.
7. Identify social, cultural and religious issues that impact business team members.
8. Explore the implications of managing a virtual team.

Description

The course has been divided into four units. The unit titles are:

1. Introduction to Teams
2. How Teams Work
3. Managing Team Conflict
4. Evaluating Team Performance

Each unit is further broken down into related topics. Each unit and many topics include self-assessment questions to ponder, activities to complete and formal assignments to complete and send to your instructor.

The units contain a number of references that learners are encouraged to review. This may require that you have access to a computer with Internet connection to download the reference. Each unit should take between two and three weeks to complete.

Required Readings

There is no single textbook for this course. Required readings are embedded in the units and topics. In addition a detailed list of references is provided. Learners are encouraged to further explore the topics presented in each unit of instruction.

Assignments and Projects

A series of activities and assignments guide you through concepts in this course and ask you to demonstrate that you can apply the concepts to support the creation of your business idea and business model. A summary of this work is included at the beginning of each unit. The major assignment in this course is found in Unit Four, where you will write a business plan for your new venture. Your institution / tutor will help you through this material and will also assign additional projects.

JOURNALING REQUIREMENTS

To capture the output from the reflective questions and activities you are asked to keep a personal journal. At the end of the course the personal journal will be submitted to your instructor for feedback and grading.

ASSESSMENT PROJECTS

Assessment takes the form of responding to activities, as well as written assignments and examinations as determined from time-time by the institution. In cases where coursework assignments, fieldwork projects, and examinations are used in combination, a percentage rating for each component will be communicated to you at the appropriate time.

TIME REQUIRED

This course is worth 16 credits, or a credit value assigned by your institution. Each credit is equivalent to 10 notional hours. You are, therefore advised to spend not less than 160 hours of study on the course. This notional time includes:

- going over activities embedded in the study material;
- peer group interaction (where necessary);
- face-to-face tutorials (where necessary);
- working on tutor-marked assignments; and
- preparation time for and sitting examinations (where that is a requirement.)

COURSE SCHEDULE

A course schedule with due dates and additional readings will be supplied to you by your institution.

STUDENT SUPPORT

Note: This section should be included in self-paced or paper-based courses that provide tutor/facilitator support and/or web and email support for the students.

ACADEMIC SUPPORT

<Insert the following information if relevant>

- How to contract a tutor/facilitator (Phone number, email, office hours, etc.).
- Background information about the tutor/facilitator if he/she does not change regularly. Alternatively provide a separate letter with the package describing your tutor/facilitator's background.
- Description of any resources that they may need to procure to complete the course (e.g. lab kits, etc.).
- How to access the library (either in person, by email or online).

HOW TO SUBMIT ASSIGNMENTS

<If the course requires that assignments be regularly graded, then insert a description of how and where to submit assignments. Also explain how the learners will receive feedback.>

TECHNICAL SUPPORT

<If the students must access content online or use email to submit assignments, then a technical support section is required. You need to include how to complete basic tasks and a phone number that they can call if they are having difficulty getting online>.

UNIT 1 – WORKING IN GROUPS AND TEAMS

UNIT INTRODUCTION

Being able to work with people so that the right things happen is a core management skill. Managing people effectively perhaps demands most of managers when individuals come together to work in a group or in a team, which requires leadership as well as facilitating and overseeing group and team working, and managing conflict. This week we explore team working from start to finish. This includes deciding if the creation of a group or team is the best approach to the task in hand (it is not always!), selecting individuals to work in it, setting up the team-working processes, supporting teams through the different stages of development, reviewing progress and evaluating team outputs. The main activity involves problem-solving, based on a current situation with a team or group that you manage or with which you are familiar.

UNIT OBJECTIVES

Upon completion of this unit you will be able to:

1. recognise the difference between groups and teams and understand when each is more appropriate;
2. understand issues in team constitution (team roles);
3. identify the different stages of team development and how a manager can support the team at each stage; and
4. identify team processes (inputs, throughputs and outputs).

UNIT READINGS

A list of references and suggested readings are offered at the end of the unit. It is recommended that you read at least two of the referenced chapters/articles.

ASSIGNMENTS AND ACTIVITIES

<Insert a description of the unit assignments, activities and discussions to be completed as they progress through the unit. Detailed instructions can be attached as Appendices to the course main body.>

TOPIC 1.1 – INTRODUCTION TO TEAMS

INTRODUCTION

This topic provides a general introduction to groups and teams used in workplaces, when they are needed, and how the task influences the size and constitution of a group or team. In many organisations groups are referred to as teams, but there are differences, which you should be able to identify as you read.

OBJECTIVES

Upon completion of this topic you will be able to:

1. Describe the difference between a group and a team.
2. Categorize different types of teams.
3. Explain key characteristics of teams.

WORKING IN GROUPS AND TEAMS

Before we begin let's explore some questions that you need to consider before proceeding.

Activity 1 - Group/Team Work: A Reflection

This activity is designed to help you to consider the range of issues that managers need to be aware of in order to understand and successfully manage group and team work. This will help to prepare you for the unit, which takes a holistic approach to the team-work process.

First, consider a team or group in which you have participated. You can choose a work group or team, or a group or team from another area of your life, for example, a voluntary action group or team. Now respond to the questions below. Note any other thoughts not prompted by the questions. Your responses may help you in Activity 2.

1. What was the purpose of the group or team? How well did it achieve its goals and aims? Who was involved in it?
2. How were members selected?
3. Did they have different skills and experiences? If so, were they complementary?
4. What processes and activities worked well and what did not work so well?
5. What are the positive features you can remember? What are the negative features you can remember?

Record your answers in your course journal.

Comment

This activity was probably not too difficult if the group or team you chose was, for example, a work-based project team. In these cases, it is sometimes difficult to know when to call a group a team. In long-serving groups and teams, goals and objectives can also change over time. In voluntary groups, members may select themselves. Sometimes it is hard to judge the extent of difference between the skills or experiences that members have if the group or team is short- lived, or if members are required to carry out a very similar task without very much interaction. Thus, you may have found some questions were not as easy to answer as they seemed at first.

MAKING TEAMS WORK

In today's organisations, more and more work is carried out by teams and groups of people working together towards a common objective. Making teams and groups work effectively is a challenging task for the manager. Bringing individuals together can slow down and complicate everyday processes and conflict can make even the simplest task difficult to achieve.

Team working has benefits, however. It provides a structure and means of bringing together people with a suitable mix of skills and knowledge. This encourages the exchange of ideas, creativity, motivation and job satisfaction and can extend individual roles and learning. In turn, this can improve productivity, quality and customers focus. It can also encourage employees to be more flexible and can improve the ability of the organisation to respond to fast-changing environments. The benefits and difficulties of team working are summarised well by Mabey *et al*.:

> *A team can … achieve what none of the individuals within it can do alone; with the right dynamic, a collection of ordinary individuals can achieve extraordinary feats. But the converse can also occur: a team can fail to achieve what any of its members could easily accomplish.*

(Source: Mabey *et al*., 1998)

The challenge of learning how to make teams work begins with understanding what teams and groups are.

DEFINING GROUPS AND TEAMS

The terms 'group' and 'team' are often used interchangeably. Is there really a difference between the two terms and if so what is it? A starting point in exploring this difference is to say that *all teams are groups* but *not all groups are teams*. From this it follows that what is said about groups will apply to teams but that teams will have special characteristics of their own.

Kakabadse *et al*. (1988) suggest that groups may be *formal* or *informal*, *primary* or *secondary*.

Primary groups have regular and frequent interactions with each other in working towards some common interests or tasks. A small work group and a project team are primary groups. They usually have an important influence on their members' values, attitudes and beliefs.

Such groups can be *formal*, in that they were deliberately created to serve an organisation need, or *informal*, in that the group forms outside formal structures to meet the specific needs of individuals. Boddy (2005) argues that informal teams are a powerful feature of organisational life because they bring together people who have common interests and concerns and who exchange knowledge and information.

Secondary groups are those whose members interact less frequently. These are often larger than primary groups (an example is a large committee). Their members do not have the opportunity to get to know each other well and as a result they are usually less cohesive than primary groups.

When does a group become a team? The example in the box illustrates the difference very simply.

Group or Team?

A number of people kicking a football about in the car park at lunch time is probably a group. There is little structure to what is happening; it is just a few people acting in whatever role they choose (or possibly several) because they want to get some exercise and/or they like spending time with their friends before going back to work.

However, taking this group and turning it into a football team would be a major task. Unlike the group, the team would have a clearly-stated task: for example, winning as many matches as possible. Ensuring that the team performed this task would involve choosing the right people according to their abilities and particular skills to perform clearly-defined roles. Team training would need to be available to help the individuals work better together. The performance expectations of individuals would be defined by the roles they held. For example, no-one expects, except in very unusual circumstances, that the goalkeeper will score goals or that the strikers will defend the goal. When a game is won the team is seen to have achieved the task, although individuals may still be singled out for praise, or for criticism, as appropriate.

A team, then, is a special type of group which 'unites the members towards mutually-held objectives' (Bennett, 1994).

Some differences between groups and teams are given in Table 1 on the next page.

Table 1 - Differences Between Groups and Teams

CHARACTERISTICS	GROUPS	TEAMS
Leadership	Strong, focused leader	There may be some sharing of leadership
Accountability	Individual accountability	Both individual and mutual accountability
Purpose	Identical to the organisation's mission	Work towards a specific purpose
Work products	Individuals within the group deliver	Collective work products individual products
Communication	Efficient (time bound) meetings	Open-ended discussion and active problem-solving
Effectiveness	Indirectly through their influence on others	Direct assessment of the collective work products
Work style	Groups discuss, delegate and then do the work individually	Teams discuss, decide and delegate but do the work together

The distinctions in Table 1.1 may be overstated: for example, a group may have a specific purpose and a team's effectiveness may not necessarily be directly assessed in terms of the collective work product. However, a difficulty in distinguishing groups from teams is that many so-called teams are really working groups because the emphasis is on individual effort. A real team is a small number of people with complementary skills, equally committed to a common purpose to which they hold themselves mutually accountable (Katzenbach and Smith, 1993).

People doing exactly the same job in a call centre answering customer enquiries, with the same individual targets and being overseen by the same supervisor or manager, may be called a team, but it is best described as a working group. There is overlap between teams and groups, of course. But distinctions are useful when considering whether to invest time and effort in building a team when a group will do. For a team to be effective there needs to be a clear, shared understanding of team objectives, mutual respect and trust and an appreciation of individual strengths and weaknesses. There also needs to be an atmosphere in which knowledge and expertise can be shared openly, with opportunities for each team member to make a distinctive contribution.

Is a team or group really needed?

There may be times when group working – or simply working alone – is more appropriate and more effective. For example, decision-making in groups and teams is usually slower than individual decision- making because of the need for communication and consensus. In addition, groups and teams may produce conventional rather than innovative responses to problems, because decisions may regress towards the average, with the more innovative decision options being rejected (Makin *et al.*, 1989).

In general, the greater the 'task uncertainty', that is to say the less obvious and more complex the task to be addressed, the more important it will be to work in a group or team rather than individually. This is because there will be a greater need for different skills and perspectives, especially if it is necessary to represent the different perspectives of the different stakeholders involved.

Table 2 lists some occasions when it will be appropriate to work in teams, in groups or alone.

Table 2 - When to work alone, in groups or in teams

When to work alone or in groups	When to build teams
For simple tasks or problems	For highly-complex tasks or problems
When cooperation is sufficient	When decisions by consensus are essential
When minimum discretion is required	When there is a high level of choice and uncertainty
When fast decisions are needed	When high commitment is needed
When few competences are required	When a broad range of competences and different skills are required
When members' interests are different or in conflict	When members' objectives can be brought together towards a common purpose
When an organisation credits individuals for operational outputs	When an organisation rewards team results for strategy and vision building
When innovative responses are sought	When balanced views are sought

TYPES OF TEAMS

If you have chosen to build a team to perform a task, the second question is: 'What type of team do I need?' One way of approaching this is to consider the type of task to be performed and its level, from routine to strategic. These factors in turn influence several other key dimensions of teams identified by West (2004):

- *Degree of permanence*. A team's lifetime can range from weeks to years depending on the task
- *Skill/competence required*. This depends on what levels of skill are needed to perform the task
- *Autonomy and influence*. This may depend on whether the task is routine or strategic and at what level in the organisation the team is formed.

Peckham (1999) suggests four possible types of problems relating to how well it is already known and understood and to what extent there is already a solution to this problem. These are set out in Figure 1. Four types of teams are identified to tackle these different problems: namely, problem-solving teams, creative teams, tactical teams and problem-finding teams.

Figure 1 - Possible problem types

	Known problem	Unknown problem
Unknown solution	Need: problem-solving team with autonomy	Need: creative team with freedom
Known solution	Need: tactical team with role clarity	Need: problem-finding team (analytical and creative)

(Source: adapted from Peckham, 1999)

Thus, each type of team needs a different mix of individuals with specific skills and knowledge. The mix and balance of skills must be appropriate to the nature of the task.

HOW MANY PEOPLE?

Does the task need a lot of people doing the same task (for example, a call centre) or a small, expert team addressing different parts of the task (for example, writing a textbook)? The size of the team needed will be an important consideration. The larger the team, the greater the potential variety of skills and knowledge, but as the size of the team increases each individual will have fewer opportunities to participate and influence proceedings. The size of a team is therefore a trade-off or balance between variety and individual input. A team of between five and seven people is considered best for the effective participation of all members, but to achieve the range of expertise and skills required, the group may need to be larger. This brings with it the challenges of how to manage and supervise a large team.

Homogeneous groups, whose members share similar values and beliefs, may be more satisfying to work in and may experience less conflict, but they tend to be less creative and produce greater pressures for conformity. In contrast, heterogeneous groups, whose members have a wider range of values and beliefs, are likely to experience greater conflict, but they have the potential for greater creativity and innovation.

SUMMARY

This introduction has outlined differences between groups and teams but it has also highlighted the fact that *all teams are groups* but not *all groups are teams*.

TOPIC 1.2 – CREATING SUCCESSFUL TEAMS

INTRODUCTION

This topic focusses on an 'open systems' approach' to teamwork – a helpful approach which encourages managers to consider the context in which a team works. The approach considers team processes, which are divided into three parts: *inputs*, *throughputs* and *outputs*. These highlight the different issues and activities a manager needs to engage with or oversee during the life of a team. To prepare for activity 1.2, read this section with a specific team in mind. It could be the team you referred to in activity 1.1 or a different one. Ideally it should be a workplace group or team that you manage (or one in which you participate or have participated). Think about the processes the team went through (or will go through). Make notes as you read.

OBJECTIVES

Upon completion of this topic you will be able to:

1. Identify team inputs, throughputs and outputs.
2. Describe a systems approach to team work.
3. Discuss different approaches to team work.

INPUTS, THROUGHPUTS AND OUTPUTS

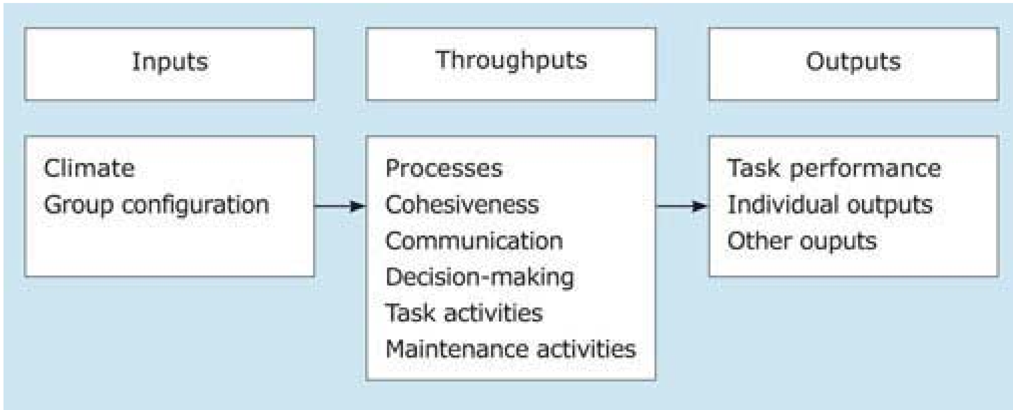
Teams need to be seen in the wider context of the organisation. It is then easier for the manager to see what he or she needs to do to ensure that the team functions successfully, and what needs to be controlled, monitored and/ or influenced within and outside the team. At the same time, the manager needs to consider the team in terms of its task phases and processes, from start to finish. This allows the manager to put a particular team-related issue in context in order to understand it better. Looking forwards, the manager needs to consider the development of team members and the skills and competences that will be useful to take to the next team and task.

A manager's task is to understand, plan and monitor all these different processes. This seemingly complex and unwieldy task is easier to understand and manage when broken down into its component parts. The open systems model of team work (Schermerhorn *et al*., 1995; Ingram *et al*., 1997) can help to explain and characterise effective team-work processes.

The Open Systems Approach to Team Work

Schermerhorn and colleagues suggest that teamwork can be considered as a three stage sequence. Teams are viewed as systems which take in resources such as time, people, skills, problems (inputs) and through transformational processes (throughputs) such as decision-making and different behaviours and activities, transform them into outputs, such as work, solutions and satisfactions (Ingram *et al*., 1997). This is illustrated in Figure 2.

Figure 2 - An Open Systems Model of Teamwork



(Source: adapted from Schermerhorn *et al*. (1995) in Ingram *et al.*, 1997)

Inputs are factors which are controlled and influenced by management. They include 'climate', the atmosphere under which the team works, and 'group configuration', how the team is put together, who is selected to work in it and why. Management will also influence how a team should work by making sure at the outset that the team strategy is in line with the vision and strategic direction of the organisation and that it uses the organisation's preferred work practices; for example, face-to-face or virtual working.

Throughputs refer to the activities and tasks that help to transform inputs into outputs. They may have the greatest influence on effective team work as they include team processes such as developing and maintaining cohesiveness, and communication. They also involve task activities which get the work done and maintenance activities which support the development and smooth functioning of the team.

Outputs are those (successful) outcomes which satisfy organisational or personal goals or other predetermined criteria. The success of outputs may be assessed by a number of stakeholders, including the organisation itself and team members, and by a range of other stakeholders. Team outputs include the performance of team tasks and individual outputs (such as professional development).

How can this framework be applied in a way which highlights how to manage or lead a team and its task? Imagine you have been asked to put together a team to produce the company's internal newsletter. What inputs, throughputs and outputs would you need? What questions would you need to ask yourself about different aspects of the process? We now consider what you might need to think about for the newsletter example. Some of the questions could be adapted and applied to other situations as well.

INPUTS

Inputs are often controlled or influenced by management. This may be the direct manager of the group or team or the result of senior management decisions and strategies. This means in practice that the way a team is put together and will function is influenced by the organisation's values, vision and strategy, and its practices and procedures.

Two main factors to consider at this stage are communication climate and group configuration.

Communication climate. In the case of the company newsletter you may need to think about the existing communication culture within the organisation and how the newsletter can enhance it. Consider the reasons for introducing the newsletter and to what extent it is in line with organisational strategy and vision. You may also want to see what existing processes and procedures can be used, what barriers and resistance there may be and what you may need to do to influence and smooth the way so that these are overcome or worked around.

Group configuration. Managers can influence the team process by their choice of team members. An effective team needs to be appropriate to the task: this includes size and the blend of talent. In the case of the newsletter, you would need to think about the skills needed and the people available to work on it. It is also useful to consider whether the task could be used as a development opportunity for someone. If so, is there also a person available to monitor and support them?

Some input-related questions for you to consider at this stage are given in the box below.

Input-related questions

1. How much support is there for this newsletter among senior management? Who might need to be influenced?
2. What objectives will it fulfil?
3. What resources will be provided for it? What others might be needed? Where could they come from? How will individuals working on this be rewarded or recognised?
4. What might they learn? What skills could they hope to develop? How many people will be needed to perform this task?
5. What technical skills are needed (e.g. desktop publishing)?
6. What training and development opportunities are available? What roles are needed (e.g. a co-coordinator)?
7. Who might work well together?

Record your responses to the questions in your course journal.

THROUGHPUTS

Some common throughputs include:

Team processes. A sense of unity is created through sharing clear goals which are understood and accepted by the members.

Cohesiveness. This involves encouraging feelings of belonging, cooperation, openness and commitment to the team.

Communication. This involves being clear, accurate, open and honest.

Decision-making. This involves making sure that established procedures are in place, that everybody is clear about leadership and an environment of trust is being created.

Task and maintenance activities. These include activities that ensure that the task is produced effectively, such as planning, agreeing on procedures and controls. They also include activities that minimise threats to the process, such as monitoring and reviewing internal processes and dealing constructively with conflict.

In the case of the newsletter project, you may need to think about ways of setting up the project. Would it be possible to have a team away day? If so, what would the themes of the day be? Perhaps you could work backwards from the finished product. How do team members envisage the newsletter in terms of aim, goals, content and look? Can they come up with an appropriate design and name for the newsletter? Then, what needs to be done in order for this to be produced? Some ground rules for working together may also need to be set at an early stage. Some throughput-related questions are set out in the box below.

Throughput-related questions

1. What can you do to build a sense of belonging among the team members? How will the group communicate? (Face-to-face, email, group software?) Do any ground rules need setting up? How can this be done?
2. What established procedures for decision-making are there? Will there be a team leader? How will the person be chosen? What tasks need to be performed to complete the project?
3. What maintenance behaviours does the group need to exhibit to get the job done and to benefit and develop from the experience?
4. Who will be responsible for ensuring that the different tasks and maintenance activities are performed?
5. Are there structures and systems in place to review processes?

Record your responses to the questions in your course journal.

OUTPUTS

Outcomes can be examined in terms of task performance, individual performance and other (incidental) outcomes.

Task performance. This may be judged on a number of criteria, such as quality of the formal outputs or objectives. In this case a product (the newsletter) and the time taken to perform the task are the criteria.

Individual outputs. These may include personal satisfaction and personal development and learning.

Other outcomes. These include transferable skills to apply in future to other teamwork. They include, for example, experience of effective teamwork and task-specific skills.

In general, it is always appropriate to evaluate outcomes. In this case you may need to think about:

- Evaluating the newsletter itself. Was it well-received?
- Evaluating individual outcomes. Have members developed transferable skills that they can take to new projects?
- Evaluating other outcomes. Has the experience enhanced team members' ability to work in a team?

Some output-related questions are set out in box below.

Output-related questions

1. Has the team completed the task it was given? Has it kept to cost and to time?
2. What has the team learned from this experience?
3. Should the team now be broken up or could it go on to another activity? What have individuals learned from the experience?
4. Have members experienced an effective team?
5. Have any learning and development needs been identified? How can they be addressed? Have members developed transferable team working and other skills?
6. Where can these skills be used in the organisation?

Record your responses to the questions in your course journal.

The open systems model of teamwork shows us how effective teamwork can offer benefits to organisations and staff. However, it also shows us that these benefits do not occur without effort and planning. Managers need to ensure that the right team is put together to perform a given task and that it is given appropriate tasks. They also need to secure the freedom, resources and support for the team to undertake the task. The model alerts managers to both the micro and the macro issues they will need to be aware of in managing effective teams.

Activity 2 - Inputs, Throughputs and Outputs

Using the notes you made, complete the following questions covering the inputs, throughputs and outputs (actual or anticipated) of your group or team. (You do not have to use the group or team you used in activity 1.1.) The group or team should be one that you manage or in which you participate or which you managed or participated in during the recent past. Use the input, throughput and outputs questions described in this topic. You should be able to answer these questions, or make informed judgements, even if the group or team has not completed its task (or it is a permanent one).

The first purpose of this activity is to help you to consolidate your thinking to help you draw on past experience to inform present and future practice. The second purpose of the activity is for you to assess whether groups or teams operate in more or less the same way in organisations. Describe the following re: your team or group.

1. Purpose of Group or Team Inputs
2. Throughputs
3. Outputs
4. The particular success factors are/were
5. Improvements could have been made in the following areas/processes

In carrying out these activities you probably found the questions in the text invaluable; however, you may have thought of other good and relevant questions. Please note these as well.

When you have completed this activity submit it to your instructor for review and feedback.

SUMMARY

The following units will set out in more detail some of the inputs, throughputs and outputs, how to manage throughputs and how to review team progress and evaluate its performance when the task is complete.

TOPIC 1.3 – TEAM ROLES

INTRODUCTION

Teams are often put together on the basis of the availability and skills of individuals, and managers are often not in a position to select team members. Yet such teams can and do function well. However, Meredith Belbin's theory (1981) of team roles is popular and influential so it is important that you know about it. What managers really require is an understanding of how people are likely to behave in a team. But note that the behaviour of people is not fixed: it is influenced by context and the behaviour of others.

OBJECTIVES

Upon completion of this topic you should be able to:

1. Describe the different roles team members can perform.
2. Explore the life cycle of a typical team.

CASE STUDY - GLENDA'S TROUBLESOME TEAM

Glenda recalled looking around the meeting room with satisfaction on the first day that her team met, feeling pleased that team members, between them, had the appropriate skills for the task. Three months later, however Matt, who had been chosen for his expert knowledge, never seemed to be able to see the 'bigger picture' – the entire task in context. As a result he occupied himself with detail and technicalities, and missed seeing important implications. Rob and Sara were quite the reverse but were argumentative. Jenny seemed uncommitted and Steve seemed to have lost all his initial enthusiasm. Glenda's initial hopes of delivering high-quality results had turned to worries about whether the task could be done to an acceptable standard.

A team is more than a set of individuals with the appropriate skills. People bring to the team not only their knowledge and skills but also their personal attributes and the ways in which they behave, contribute and relate to others. A popular idea is that these individual characteristics should be taken account of in constructing teams. While we may not be in a position to select team members, according to Belbin we need to consider these behaviours when selecting a team. A person who is known to be confident and enthusiastic is likely to behave in the same way when he or she joins a team. If all team members behave in the same way, then not only is conflict likely but the quality of the task is likely to suffer.

By ensuring a balance of behaviours or 'roles' there is a greater likelihood that the team will perform well. Belbin's research (1981) (developed and slightly amended over the years) identifies nine clusters of behaviours, or roles. He suggests that individuals will be more effective if they are allowed to play the roles they are most skilled in or most inclined to play, although they can adopt roles other than their preferred ones, if necessary.

Each role has both positive and negative aspects. The nine roles are:

1. **The implementer**, who turns ideas into practical actions. Implementers may be inflexible, however, and may have difficulty in changing their well-thought-through plans.
2. **The coordinator**, who clarifies goals and promotes decision-making. Coordinators often chair a team. They can sometimes be manipulative and delegate too much work to others.
3. **The shaper**, who has the drive and courage to overcome obstacles, and 'shapes' others to meet the team's objectives. Shapers may challenge others and may be aggressive at times.
4. **The plant**, who solves difficult problems. Often creative and unorthodox, a plant will come up with ideas but may have difficulties communicating them.
5. **The resource investigator**, who explores opportunities and develops contacts. However, initial enthusiasm may not be maintained to the end of the project, and detail may be overlooked.
6. **The monitor evaluator**, who observes and assesses what is going on and seeks all options. Often working slowly and analytically, monitor evaluators come to the 'right' decisions but can be cynical and dampen the enthusiasm of others.
7. **The team worker**, who listens, builds relationships and tries to avoid or reduce conflict between team members. Considered to be the 'oil' that keeps the team running smoothly, team workers are good listeners and diplomats. They can smooth conflicts but may not be able to take decisive action when necessary.
8. **The completer finisher**, who searches out errors and omissions and finishes on time. Often perfectionists, completer finishers are self-motivated and have high standards. They can worry about detail and can be reluctant or refuse to delegate work.
9. **The specialist**, who provides knowledge and skill. Specialists can be passionate about gaining knowledge in their field. However, their contribution to the team may be narrow and they may not be interested in matters outside their own field.

The weaknesses of Belbin's framework are that people's behaviour and interpersonal styles are influenced by context: that is, the other people in the team, the relationship with them and by the task to be performed. Moreover, research into the validity of Belbin's nine roles has shown that some are not easily distinguishable from one another and that the roles fit more easily into the more conventional framework of personality traits (Fisher et al., 2001).

However, Belbin's framework has been very influential on organisational and managerial thinking about team building and development (although it is not the only one). Such frameworks are helpful in guiding the composition of a balanced team. When, as a manager, you have no control over the composition of a team it is important to discuss with team members their strengths and weaknesses and preferred working styles.

SUMMARY

We explored the nine roles that team members can perform. This is only one model of team performance. Later in the course we will explore other roles that members may be required to embrace.

TOPIC 1.4 - MANAGING TEAM PROCESSES

INTRODUCTION

What steps do managers need to take to ensure that their teams are working effectively on a day-to-day basis? We set out the most important ones in this section, which covers mainly throughputs and some advice on management. Consider what you might do to make a difference to the management of a group or team you are responsible for, or what you might do differently with a future team.

OBJECTIVES

Upon completion of this topic you should be able to:

1. Establish team goals and objectives.
2. Identify team ground rules.
3. Allocate and facilitate the completion of team tasks.
4. Explore how to develop trust and achieve consensus.
5. Identify strategies to manage teams.

TEAM GOALS AND OBJECTIVES

A team needs clear goals that members believe are important and worthwhile. A team is more likely to be effective if it can participate in developing team objectives and work out how they are to be achieved, even if the team's overall goal has been imposed from above. Discussions should lead to action planning, including specific milestones, timetables and monitoring activities to keep the team focused and to create an appropriate sense of urgency. Defining a measurable output gives the team a framework to work within.

GROUND RULES

The team needs to establish a mutually-agreed working approach. The means of participation and expectations of the team experience should be agreed on. Discussions will inevitably consider the norms and values held by the team and what rules are needed to preserve these.

Team members will also need to discuss process issues, such as how the group evaluates and self- regulates itself (that is, how any performance issues will be addressed) and how conflicts are managed.

ALLOCATING TASKS

The allocation of tasks, responsibilities and priorities of individual team members is usually done, at least partly, through joint discussion and negotiations in the team. If the team has a manager, it will be the manager's responsibility to see that this is done effectively. Usually the process will be supported and strengthened by regular supervision and appraisal. Key questions for the manager to ask are:

1. Has work been fairly distributed between team members?

2. Have roles and responsibilities of team members been decided?
3. Has each individual member taken personal responsibility for at least some aspect of the team task?

(Source: adapted from West, 2004)

Developing Individual Contributions

Based on their prior experience, team members will bring assumptions and ideas about how teams should operate, what is expected of them and what they can expect from the team-working experience. These assumptions, ideas and expectations may not be appropriate to the current situation. Conversations are essential to bring to the surface any possible tensions. Questions for the manager to address here include:

1. How well do the tasks allocated fit with the person's preferred 'role(s)'?
2. Who has the skills and experience to handle a particular task competently and efficiently?
3. Who will find the task useful for their development?
4. What further training, development or support might an individual need?

Task and Maintenance Activities

One way of monitoring the successful functioning of teams is to look at two different types of behaviours. Task behaviours are those that aim to achieve the project or overall tasks set. Maintenance behaviours are those that keep the team running smoothly. It is important that both types of behaviours are present. Some examples are shown in Table 3.

Table 3 - Task- and Maintenance-Orientated Behaviours

Task	Maintenance
Proposing	Proposing ideas or courses of action that help the achievement of the task
Gatekeeping	Making a positive attempt to bring a person into the discussion or making an equally clear attempt to prevent a person from being excluded
Building	Adding to other people's proposals
Encouraging	Behaving or responding in a warm and friendly way
Disagreeing	Contesting proposals that seem to be misconceived and might work against the achievement of the task
Resolving Conflict	Being ready to compromise and accept what others want to do
Giving and Seeking Information	Providing data and opinions relevant to the task achievement
Giving Feedback	Giving position feedback on feelings and opinions
Summarising	Summarising a discussion or the group's progress
Recognising Feelings	In general, recognising that people have personal feelings about their work

Finding a balance between the two types of behaviours can be difficult. Managers may need to work hard to control the emergence of individuals' personal interests, motivations and agendas which can be detrimental to team working. Trust between team members can help individuals to suppress their personal interests for the good of team development and performance.

DEVELOPING TRUST

A reasonable degree of trust is an essential ingredient of any successful relationship. Without trust, communication will deteriorate because people will begin to hide their views or try to impose them.

Each member of a team must take some responsibility for the development of trust, although team leaders and managers have the greatest responsibility and the greatest influence. Trust is likely to develop when people listen to and respect each other's views, irrespective of whether or not they agree with them. Then they are able to share their ideas and views without fear of recrimination.

A team manager can help to ensure the development of trust by involving team members in setting team and individual goals and by giving the team members the necessary autonomy to carry out their tasks without undue interference. Managers should take care, however, that delegating responsibility to team members does not result in abdicating responsibility – that is, ceasing to monitor the performance of team members. A team must also have ways of monitoring and giving feedback on the performance of its members. Any effective team will need to conduct regular reviews.

The higher the level of trust a group has, the easier it will be to deal with conflict when it (almost inevitably) occurs.

ARRIVING AT CONSENSUS IN A TEAM

Conflict is perhaps most likely to arise in team work during decision-making. You can help to avoid unnecessary conflict by ensuring that individuals see and understand the logic of what you are proposing, by exploring and discussing the proposals and by making sure there is agreement before proposals are finalised. Some guidelines are:

- Present a position logically, pointing out strengths and weaknesses and illustrating with examples.
- Try to avoid using your extra power as team leader or manager.
- Demonstrate the benefits as well as any disadvantages of the proposal.
- Avoid changing your mind or agreeing with something because this is easier than promoting or defining what you regard as a good proposal.
- Remember that consideration of a variety of ideas and opinions is likely to be constructive.
- Make sure that everybody has access to all the information needed to reach considered opinions.

Sometimes during the life of a team, conflict can run so high that communication is impaired and intervention may be necessary. At such times, the team will need to examine its own progress. Here, the manager or leader will need to:

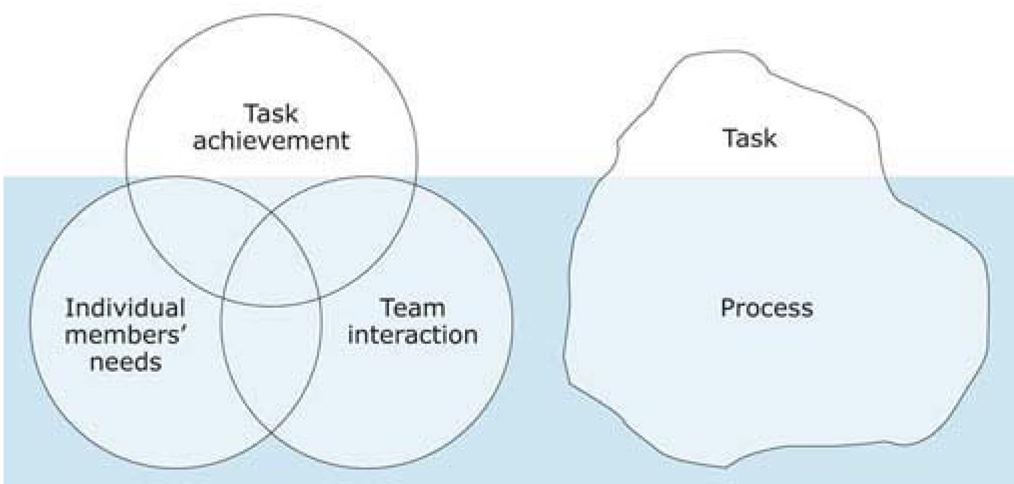
- ensure that behaviour between members is appropriate;
- reinforce and support desirable behaviour;
- be prepared to raise the issue of inappropriate behaviour;
- create a sense of fairness by empowering or sharing power across team members; and
- make sure the team goals are shared.

(Source: adapted from Hill and Farkas, 2001)

SOME TIPS ON LEADING AND MANAGING TEAMS

Team leaders and managers need to make sure the task is done and that the team develops in ways that benefit both the task and the experience of individual team members. Figure 3 illustrates how the task, the team and the individual are always linked. For example, team members' satisfaction will be derived not only from the achievement of tasks but also from the quality of team relationships, team morale, trust and team spirit, and the more social aspects of teamwork.

Figure 3 - The Internal Elements of Team Effectiveness



Different leaders will inevitably have different styles and approaches to leadership. Some leaders may tend towards a more directive style, wanting to tell team members what to do. The danger here is alienating the team and not allowing room for creativity and spontaneity. The challenge for a leader who adopts this style will be to try to involve team members more and to seek their opinions. Other leaders may adopt a democratic approach, asking questions and getting people involved. The danger here is that debate drifts too much and no clear direction emerges. The challenge is to develop structure. Leaders may also differ in their degree of involvement in the task. However, successful and effective team leaders have some common characteristics. These include:

- listening to team members;
- questioning them to understand their point of view; and
- being responsive to feedback.

Similarly, there are reasons why team leaders fail (Hackman, 1990, 2002). These are set out as reason and remedies in Box 7 with additional contributions by West (2004). Because of the overlap between leadership and management, some remedies cover management issues.

Why Team Leaders Fail: Reasons and Remedies

Reason

Calling the performing unit a team, but really managing them as individuals.

Remedy

- Assign individual responsibilities but coordinate them so that the efforts of individuals combine to form the whole-team product
- Alternatively, assign a team task and give members responsibility for determining how that task should be completed.

Reason

Exercising too little or too much authority: a typical mistake is giving a team too much autonomy early in its life when direction is needed and then intervening too heavily later when the team is not performing well.

Remedy

- Work closely with the team at the outset
- Draw up ground rules, including the amount and timing of management intervention
- Agree on a regular review process.

Reason

Assembling a large group in which structures and responsibilities are not clear.

Remedy

- Make sure that a well-designed team task is in place, that the team is balanced and suitable for the task and that members have clear and unambiguous information about the extent and limits of their authority and accountability. Team members will then not do things that are not required or make decisions that are not appropriate for them to make.

Reason

Specifying challenging team objectives but providing too little organisational support.

Remedy

- Ensure that resources and support are available
- Hold regular team reviews
- Ensure provision of individual training and development.

Reason

Assuming incorrectly that members already have the skills to work well as a team.

Remedy

- Conduct a team skills audit early in the team process: this can be a simple identification and review of members' skills
- Address any training and development needs that emerge from this
- Encourage open discussion about individual strengths and weaknesses and team roles.

(Source: adapted from Hackman, 1990, 2002 and West, 2004)

A Team Leader's Checklist

A useful checklist for team leaders and managers is provided below. When managing your teams consider the following actions and the purpose for the action.

Action	Purpose
Create conditions for team effectiveness	The team has a clear mandate or purpose
	The team structures itself to do the work efficiently
Agree goals	Performance expectations and objectives/ outputs are clear
Facilitate communication	Participation is monitored; those who are not participating are encouraged to do so
	Different conversational and participation styles are encouraged
	There is active listening (the focus is on what is meant rather than how it is said)
	Influence is based on task-relevant knowledge and skills rather than external status and personal dominance
Adopt a rigorous decision-making process	Sufficient time is spent identifying and framing the problem, task or project
	Information and alternative solutions or methods are thoroughly examined

Action	Purpose
	Team members are aware of and happy with the decision-making process used
Develop appropriate working methods	Constructive task conflict is encouraged and supported
	Collaboration is encouraged
	The team is a 'safe' place to share information and ideas
	Reflection on team process is encouraged
	Mistakes are a source of learning
Be sensitive to team diversity	Team members make an effort to understand and adapt to each other's working styles
	Team members understand how demographic differences such as culture and age might influence participation and influence
	The team has processes for utilising diversity
Manage context	There is action to remove external barriers to the team's effectiveness
	There is action to provide the resources the team needs and to promote the team's interests with key stakeholders.

(Source: adapted from Hill and Farkas, 2001)

MULTICULTURAL GROUPS AND TEAMS

When groups or teams comprise people from just one culture, there are often agreed but unspoken social, organisational and national ways of behaving that do not need to be explained. It can usually be assumed that everyone has a common understanding of what a group is, how it will work, and how leaders and followers will behave. But such assumptions do not hold true when people are from different cultures.

In France, the common assumption is that the authority to make decisions comes as a right of office or rank, while managers in the Netherlands, Scandinavia and the UK often make their decisions in consultation with others and may be prepared to be challenged.

When creating multicultural groups or teams, managers need to consider the following points:

- While professional skills are important, you may want evidence of a person's ability to work with others;
- Provide the team with initial support – for example, bring the whole team together for two days with the specific aim of providing them with an awareness of cultural differences and their impact on organisational style and systems, management style, decision-making and interpersonal behaviour;
- helping them become aware of their different roles, preferences and strengths and how these can complement each other;
- building an international micro culture through exploring culture and cultural differences
- identifying methods of communicating swiftly and effectively; and

- developing a set of ground rules for maintaining group effectiveness when working together and when working apart.

Realistic ground rules for such a team might include:

- do not make assumptions; if you do, check them;
- do not be impatient;
- allow time to express yourself;
- have the courage to challenge;
- learn more of the others' cultures;
- give and ask for feedback;
- try to eliminate stereotyping;
- take a positive attitude; and
- accept the differences.

(Source: based on Neale and Mindel, 1992)

Virtual and multicultural groups and teams present challenges not only because their creation and management are more demanding but often because organisations and managers have no prior experience to draw on. There will be no substitute for seeking information, clear thinking and good planning if such initiatives are to be successful.

SUMMARY

In this extensive topic we explored a number methods and concepts important to team formation and management. Team leaders must develop strategies, ground rules and trust to successfully manage his or her team in the completion of the team tasks and achievement of the team goals and objectives.

UNIT 1 – SUMMARY

SUMMARY

This first unit introduced you to the concept of team, team leadership and team management. It described the differences and similarities of groups and teams. We looked at some of the guidelines required to implement a successful team: goals and objectives; rules; trust; and consensus. We examined why teams fail and strategies that will help us avoid these failures in the future. In the next unit we explore how teams work and how to ensure we create and manage successful teams.

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UNIT 2 - HOW TEAMS WORK

INTRODUCTION

In this unit we shall explore some of the concepts, issues and theories that apply when working as a member of a team. Some of these factors are generally applicable to all teams – both face-to-face and virtual. Other factors are enhanced, reduced or changed by the degree to which the team is a virtual team.

This unit is from our archive and is an adapted extract from *Working in virtual project teams* (M891) which is no longer taught by The Open University. If you want to study formally with us, you may wish to explore other courses we offer in this subject area.

UNIT OBJECTIVES

After completing this unit you should be able to:

1. Understand the issues and processes that relate to team formation and development in a virtual context.
2. Identify barriers to effective team work in a virtual environment and propose solutions.
3. Review and comment on team activities in a virtual environment and develop insights to make informed judgements and recommendations for future good practice.
4. Synthesise theory and practical experience to make recommendations for good practice in new team environments.
5. Review and comment on team activities in a virtual environment and develop insights to make informed judgements and recommendations for future good practice.
6. Synthesise theory and practical experience to make recommendations for good practice in new team environments.
7. Synthesise theory and practical experience to make recommendations for good practice in new team environments.

UNIT READINGS

A list of references and suggested readings are offered at the end of the unit. It is recommended that you read at least two of the referenced chapters/articles.

TOPIC 2.1 – DIFFERENT TYPES OF TEAMS

INTRODUCTION

Different organisations and situations may well use different types of team. The type of team affects how that team is organised and managed and what the communication needs of the team are. These in turn are affected by the nature of the task that the team has been created to carry out.

In this topic we discuss four types of team: project teams, operational teams, self-managed (or self- directed) teams, and communities of practice. In practice, it is often the case that teams do not fall clearly into one type of team, but may combine elements of different types of team. While project teams and operational teams have been recognised for many years, self-managed teams are a relatively recent phenomenon and reflect flatter organisational structures and the management style of the times. Communities of practice, some would argue, are not teams, but they have come into prominence with the development of the internet, which facilitates bringing together groups of like-minded people who have some shared purpose.

OBJECTIVES

Upon completion of this topic you should be able to:

1. Describe different types of teams.
2. Identify the strengths and weaknesses of different team structures.
3. Create and manage self-managed teams.
4. Employ best practices in team management.
5. Employ communities of practice to guide teams.

PROJECT TEAMS

A project team consists of a group of people who come together as a distinct organisational unit in order to work on one or more projects. The team is often led by a project manager, although project teams may also be self-managed. There are several commonly accepted types of project team: the functional team, the matrix team and the contract team.

The Functional Team

A function team is a team in which work is carried out within a functionally organised group, where people working together carry out the same or similar functions. In organisations where functional divisions are relatively rigid, project work can be handed from one functional team to another in order to complete the work. For example, work on a new product can pass from marketing, which has the idea, to research and development, which sees whether it is technically feasible, then to design and finally to manufacturing. This is sometimes known as ‘baton passing’, following the analogy of a team running a relay race. Needless to say, developing projects using this type of teamwork requires that a manager with oversight of the entire project must ensure that each functional team hands work over to its successor team in such a state that the successor team can carry on with it without undue problems.

The baton-passing technique has been used to hasten product development and reduce time to market by having teams (not necessarily functional teams) distributed in locations around the world. As the working day finishes in one location, so the team's work is passed on to the next location, where the working day is just beginning.

The Matrix Team

Matrix structures are often found in project teams. In a matrix team, individual staff report to different managers for different aspects of their work. Staff will be responsible to the project manager for their work on the project, while their functional line manager will be responsible for other aspects of their work, such as training and career development, as well as 'routine' tasks. This matrix project structure is represented in Figure 4.

Figure 4 - Matrix project structure

	Department			
	Design	*Research and development*	*Manufacturing*	*Marketing*
People assigned to the team	Andrew	Bashar Colin	Davina Edward Fi-Han	George

It is important to overcome the problems that staff might have with the dual reporting lines (the 'two-boss' problem) because it is possible for a team member to receive conflicting instructions from their functional manager and their project manager. This requires building good interpersonal relationships with the team members and regular, effective communication.

The Contract Team

A contract team is typically brought in from outside an organisation in order to perform the project work. Here, the responsibility to deliver the project rests very firmly with the project manager. Relationships between the contract team and the client are particularly important in this type of team. A variant of this is the so-called 'outsourced supply team', which simply means that the team is physically situated remotely from the project manager, who then encounters the additional problem of 'managing at a distance'. These teams are becoming increasingly common in a globalised world. Although the concept is simple, time zone, culture and communication issues make this a challenging project to manage.

PROJECT TEAMS IN PRACTICE

In reality, few teams are exactly as described in the previous section and they are usually some hybrid or mixture of these basic forms. For example, an operational team may be a permanent part of an organisation's structure – a top management team or a team running a helpdesk. Or the team may be temporary, such as a project team set up to introduce a new piece of software into an organisation. Some authors note that there is a spectrum of team organisation structures from functional through matrix and on to a project or single team structure. The different structures for project teams have different advantages and disadvantages so that one team structure may suit a particular task in some organisations better than another.

Table 4 sets out the strengths and weaknesses of different team structures. Note that in this table, we are defining a client to be a person or organisation that requested or receives the product of the team's work.

Table 4 - Some strengths and weaknesses of different structures for project teams

	Strengths	Weaknesses
Functional Team	Handles routine work well. Line management has control of projects. Pools technical and professional expertise.	Communication and coordination across functional areas in an organisation is more difficult. Can be inflexible. Tends to push decision making upwards.
Matrix Team	Acceptable to traditional managers. Top management retains control of projects but are relieved of day-to-day decisions. Flexibility in the personnel assigned.	Project staff have dual reporting lines, which can cause conflicts of priorities. Staff appraisal and performance measurement is difficult. The team leader may not be able to influence who is assigned to the project.
Contract Team	Easy to employ technical and professional expertise. Reduces training requirements for the client. The team can use its own management structure. Can be used to bring a number of organisations together.	Difficult for the client to assess the quality of the work and progress of the project. There may be problems on acceptance as the client is the judge of project success. Difficult to identify and resolve political or organisational issues. Communication between geographically remote team members is difficult.

(The Open University, 2008)

OPERATIONAL TEAMS

An operational team is formed to undertake some ongoing activities that are required for the provision of goods or services. For example, the counter service and telephone services operated by a bank are provided by operational teams that are supplying a service to the public, whereas an accounting department within a larger organisation is supplying a service to other parts of the organisation. The purpose of the operational team is usually specified in terms of the level of service or the quality of the goods supplied.

Operational teams usually have well-defined roles and responsibilities. While the idea of team roles is typically applied to project teams, an operational team also needs a variety of types of people to support the processes and progress of the team.

An operational team can be a virtual team. However, it is less common for an operational team to be fully virtual than some other types of team. It is more likely that some, if not all, operational team members will be collocated. If the team does operate from more than one location it will be split into sub-teams, each of which will be collocated. The needs of a virtual operational team are very similar to the needs of a virtual project team; in particular, they need some shared workspace that may be wholly or partly virtual.

In some circumstances, operational teams can work as project teams. For example, an accounts department provides an ongoing service to other parts of the organisation. When the organisation needs to produce end-of-year accounts this can be approached as a project. A schedule may be devised, with interim milestones building towards the goal of producing a set of accounts that are complete, accurate and on time.

Reflective Questions

The following list of tasks could be undertaken by an operational team or some form of project team. What form of organisation would be most appropriate for managing them? Briefly state the reason(s) for your choices.

1. Processing applications for entry to a professional society.
2. Devising an information security policy for an organisation.
3. Designing and developing a new production line in a manufacturing company.
4. Installing a new production line in an engineering firm.
5. Improving the methods of research and development of a car manufacturer.
6. Developing software for patient admissions in a hospital.
7. Introducing an automated warehousing system at all the depots of a supermarket chain.

Record your responses in your course journal.

The above questions must involve a set of routine tasks that the organisation must be equipped to perform; hence it would be carried out by an operational team.

This is likely to involve a project team structure. Inputs to formulating the strategy would be needed from various areas, plus professional and technical inputs.

Inputs from various different specialists at different stages would be needed, suggesting that a matrix project structure is most likely.

Installing production lines is likely to happen quite often in this industry, but the work is likely to be the responsibility of one department: engineering. This suggests using the existing functional organisation, so this is likely to require a functional project team.

This could be the responsibility of either a functional or a matrix project team. Making incremental improvements would be the responsibility of the various line managers for the different functions involved. However, if new systems or radical change (e.g. process improvements or changes or business process re-engineering) were involved, a project structure would be needed – probably of a matrix type because of the various different professional interests (such as academic, legal and regulatory, formulation and analysis).

This is likely to be the responsibility of a functional team, possibly with baton passing, or with a project manager or coordinator if it is part of a wider project. The question did not mention a new system, so the straightforward computerisation of an existing system with known requirements is implied – hence the choice of a functional approach.

The supermarket is unlikely to have the necessary expertise in warehouse automation: (i.e. using robots for simple, repetitive tasks). The design and implementation of the automated warehousing system will require specialist resources and hence a contract team is most likely.

SELF-MANAGEDTEAMS

Self-managed teams have been described as one of the more important approaches to improving team performance in recent years. Other teams with this style of team organisation are described as 'self- directed teams' and 'semi-autonomous work groups', which gives some sense of how a self-managed team manages itself.

A self-managed team is a team in which the members take collective responsibility for ensuring that the team operates effectively and meets its targets. Typically, members of self-managed teams are employees within an organization who work together, within a broad framework of aims and objectives, to reach a common goal. When setting up the team, two of the parameters that have to be defined are the levels of responsibility and autonomy that are given to the self-managed team. So teams can have varying degrees of autonomy, from teams who have considerable control over their work, and the boundaries within which they operate, to self-managed teams that are set boundaries by team leaders. (Some authors give different names to teams at different ends of this spectrum. In this unit we use the same term.)

In general, self-managed teams have considerable discretion over:

- the work done and setting team goals;
- how work is achieved – which processes are used and how work is scheduled; and
- internal performance issues – distributing the work and the contribution made by each member of the team decision making and problem solving.

LEADING A SELF-MANAGED TEAM

The leadership role in a self-managed team is very different from that of a team leader in a traditional hierarchical team such as a functional team. In a hierarchical team the team leader allocates work. In contrast, in a self-managed team, the leadership role involves taking on more of a supporting role, which includes identifying the long-term career and personal development needs of the team within the context of the overall organisation. Table 5 compares the roles of a team leader in these two types of team.

Table 5 - The roles of a team leader in a hierarchical team and a self- managed team

The team leadership role in a:	
Hierarchical team	Self-managed team
The role is vested in one individual.	The role may be shared.
To manage the team.	To support the team by providing (or arranging others to provide) coaching and advice.
To plan and allocate the work done by the team.	To agree, in discussion with the team, the standard of work and the aims, objectives and targets of the team.
To monitor and appraise the performance of team members in carrying out the tasks allocated to them.	To monitor the achievement of the team as a unit. To appraise individual performance.
To motivate the team members.	To provide the conditions for high motivation.
To facilitate the creation of channels of communication with the rest of the organisation.	To act as the main contact point for communication between the team and the rest of the organisation.

(Based on the Self-directed Teams topic, Good Practice Ltd.)

BENEFITS OF SELF-MANAGED TEAMS

Individual team members may have the opportunity to use their skills and experience outside their specified remit (or job title) within an organisation. Since team roles within self-managed teams are much more fluid than in hierarchical teams, team members may have increased discretion over their work, which can lead to greater motivation and improved performance. Team members may also have greater freedom to complement each other's skills. Finally, team leaders can act more strategically, resulting in fewer surprises and purposeful team development, since they are freed from some of the management tasks required of team leaders in hierarchical teams.

The benefits of self-managed teams include (based on Howell, 2001):

- *Cost savings*: Organisations such as RCAR Electronics in the USA reported annual savings of $10 million following the implementation of self-managed teams.
- *Innovation*: Team members have the freedom to review and improve working practices.

- *Effective decision making*: Self-managed teams can develop quicker or more effective decision- making skills.
- *Increased productivity*: Teams work towards a common goal and are responsible for their own actions. When successful, self-managed teams can be 15–20 per cent more productive than other types of team.
- *Improved customer satisfaction*: Self-managed teams benefit organisational performance through improved sales figures and customer service. Companies have reported significantly lower customer returns and complaints.
- *Commitment*: Team members can become more involved in projects as a direct result of having increased autonomy and responsibility.
- *Motivation*: Team members have shared or equal responsibility so members are accountable for their actions.
- *Increased compatibility between employers and employees*: Self-managed teams can relieve stress for the leader, who is then able to concentrate on other tasks. The team is mutually supportive and members learn from each other instead of approaching the team leader for advice.

Potential Problems with Self-Managed Teams

For all their potential benefits, successful self-managed teams are not without their problems. They can be difficult to set up, particularly if there is not a culture of using self-managed teams in an organisation. For example, the team may find it difficult to interact with other parts of the organisation because of their different working practices. Individuals new to self-managed teams may be anxious if they perceive that they may be given extra responsibility. Conversely, team leaders may feel that their role is threatened by having some responsibility taken away from them. Everyone may need additional training to give them the extra skills that they may require in their new team. There can be more redundant communication in self-managed teams because there is often no clear structure for communication, obtaining guidance or making decisions. Consequently, guidance may be sought from the entire team and decisions will be made by discussion, rather than by reference to a team leader who is empowered to make decisions, as would be the norm in a project or operational team. The team leader must provide an initial structure until the team has established its rules and norms. Finally, an ever-present problem with teams is that of ‘freeloaders’. If a member of a team does not meet their responsibilities this will impact upon the work of the other team members, and hence the productivity of the team as a whole.

Planning, preparation, ongoing communication and follow-up are all necessary for a transition towards self-managed team working. For a self-managed team to remain successful, its members must be tolerant of errors and allow for learning, and there must be trust both within the teams and between the team members and team leader. This will allow risks to be taken and information to be shared, and will foster a willingness to accept change.

COMMUNITIES OF PRACTICE

Communities of practice are not a new phenomenon, but they have become much more popular in recent years as a means of supporting people in improving their performance. A community of practice can be formed by people who engage in a process of collective learning through their shared experiences and practices. For example, a group of engineers working on similar problems, a network of surgeons exploring novel techniques, or a gathering of first-time managers helping each other cope could all be examples of a community of practice. The concept has been popularised, particularly in the educational context, by Etienne Wenger, who provides the following definition.

> *Communities of practice are groups of people who share a concern or a passion for something they do and learn how to do it better as they interact regularly.*

Wenger (2009)

Wenger identifies three characteristics of a group that are crucial to it being a community of practice. These are:

1. *The domain*: A community of practice is not merely a club of friends or a network of connections between people. It has an identity defined by a shared domain of interest. Membership therefore implies a commitment to the domain, and a shared competence that distinguishes members from other people. The domain is not necessarily something recognised as 'expertise' outside the community.

2. *The community*: In pursuing their interest in their domain, members engage in joint activities and discussions, help each other, and share information. They build relationships that enable them to learn from each other. A website in itself is not a community of practice. Having the same job or the same title does not make for a community of practice unless members interact and learn together. The claims processors in a large insurance company or students in American high schools may have much in common, yet unless they interact and learn together, they do not form a community of practice. But members of a community of practice do not necessarily work together on a daily basis. The Impressionists, for instance, used to meet in cafés and studios to discuss the style of painting they were inventing together. These interactions were essential to making them a community of practice even though they often painted alone.

3. *The practice*: A community of practice is not merely a community of interest – people who like certain kinds of movies, for instance. Members of a community of practice are practitioners. They develop a shared repertoire of resources: experiences, stories, tools, ways of addressing recurring problems – in short, a shared practice. This takes time and sustained interaction. A good conversation with a stranger on an airplane may give you all sorts of interesting insights, but it does not

> in itself make for a community of practice. The development of a shared practice may be more or less self-conscious. The ‘windshield wipers’ engineers at an auto manufacturer make a concerted effort to collect and document the tricks and lessons they have learnt into a knowledge base. By contrast, nurses who meet regularly for lunch in a hospital cafeteria may not realise that their lunch discussions are one of their main sources of knowledge about how to care for patients. Still, in the course of all these conversations, they have developed a set of stories and cases that have become a shared repertoire for their practice.

Summarised from Wenger (2009)

Every community of practice must have all three elements: a domain, a community and a practice. But they come in a variety of shapes and sizes, from small to very large, from local to global, from meeting face-to-face to meeting only online. Some exist only within one organisation, whereas others span several organisations. Some, such as professional societies, are formally constituted, whereas others are very informal.

Activity 3 - Communities of practice

Given the above description of communities of practice, identify those communities of practice to which you belong.

Record a list and description of at least two communities of practice you either visit or have discovered in your course journal. Provide a URL to the COP.

Discussion

Depending on your background and experience, you might be part of, or have had contact with, a variety of communities of practice – at home, at work, or socially. Here we discuss a number of examples, based on the discussion in Wenger (2009).

Business organisations have been quick to adopt the communities of practice concept because they recognise that organisational knowledge is a critical asset that needs to be managed strategically. Prior attempts to manage knowledge in organisations have often focused on technical solutions based on information systems. Communities of practice provide an approach to capturing, disseminating and developing organisational knowledge which is people-focused rather than technology-focused. However, communities of practice can be perceived as a threat to traditional, hierarchically structured organisations because they are not constrained by formal structures: people within a community of practice can create links between people that span organisational and geographic boundaries.

In the same way that businesses face knowledge management challenges, so do local and national governments. Communities of practice provide a mechanism for enabling connections between people across formal structures and facilitating more open knowledge sharing.

Professional societies and similar associations are making increasing use of the concepts of reflection and reflective practice as a way of developing more professional and responsible practitioners. In addition to more traditional courses and publications for Continuing Professional Development (CPD), communities of practice offer less formal opportunities for peer-to-peer learning.

COP Reflection

Many people are involved in communities of practice through their hobbies and interests; allotment holders, for example. The domain is gardening; the community is made up of those people who rent an allotment at each site, and the practice involves becoming better gardeners or allotment holders. Through meetings, shows and other events, seeds, plants and information are exchanged.

There is a community of practice within The Open University for ‘e-learning’, which is a voluntary grouping of staff interested in developing their understanding and use of e-learning for pedagogical uses. It provides opportunities for interaction through seminars and other gatherings, and produces a regular update of activities and objects related to e-learning. So there’s a domain, a community and practice.

Arguably, the internet, and particularly Web 2.0, have allowed communities of practice to flourish. As this unit demonstrates, electronic communication technologies have extended our reach beyond the limitations imposed by geography, making it possible to interact and form communities with people across the world.

The concept of community of practice is influencing theory and practice in many domains. From humble beginnings in apprenticeship studies, the concept was seized by businesses interested in knowledge management and has progressively found its way into other sectors. It has now become the foundation of a perspective on knowledge and learning that informs efforts to create learning systems in various sectors and at various levels of geographical scale, from local communities to single organisations, partnerships, cities, regions and the entire world.

Summary

This topic has dealt with four specific types of teams: project teams, operational teams, self-managed teams and communities of practice. It was acknowledged that, in practice, real teams tend to cross the boundaries between these types of team.

A project team consists of a group of people who come together as a distinct organisational unit in order to work on one or more projects. The team is often led by a project manager, although project teams may also be self-managed. There are several commonly accepted types of project team: the functional team, the project team, the matrix team and the contract team. A functional team is a team in which work is carried out within a functionally organised group where people working together carry out the same or similar functions. A project team consists of a group of people who all belong to the same organisation but work as a separate unit on one or more projects. In a matrix team, individual staff report to different managers for different aspects of their work. Staff are responsible to the project manager for their work on the project while their functional line manager is responsible for other aspects of their work. A contract team is typically brought in from outside an organisation in order to perform the project work.

The strengths and weaknesses of the different categories of project teams were discussed.

An operational team is formed to undertake some ongoing activities that are required for the provision of goods or services.

A self-managed team is a team in which the members take collective responsibility for ensuring that the team operates effectively and meets its targets. The benefits of a self-managed team include cost savings, innovation, effective decision making, increased productivity, improved customer satisfaction, commitment, motivation and increased compatibility between employers and employees. However, there are potential problems: they can be difficult to set up, particularly if there is not a culture of using self- managed teams in an organisation, and there is the perennial problem of individuals not contributing fully (meeting their responsibilities).

A community of practice is a group of people who share a concern or a passion for something they do and learn how to do it better as they interact regularly. To be a community of practice, the group must consist of practitioners in a domain who engage in joint activities and discussions to help each other and share information.

TOPIC 2.2 – VIRTUAL TEAMS

INTRODUCTION

Many businesses, large and small, work in a virtual environment. In this type of environment managers and employees may be located in different physical and geographic locations. Even though the team members are separated by time and distance they must still be able to communicate and complete the work assigned to the team. What differs is the method of communications and the use of technology to share the work and collaborate with team peers. This topic will explore the workings of virtual teams.

OBJECTIVES

Upon completion of this topic you should be able to:

1. Describe the similarities and differences between virtual and physical teams.
2. Examine the team process and what must change to support virtual team success.
3. Discuss the role of the manager in a virtual team.
4. Examine the strategies that can help virtual teams succeed.

WHAT IS A VIRTUAL TEAM?

A virtual team is one whose primary means of communicating is electronic, with only occasional phone and face-to-face communication, if at all. However, there is no single point at which a team 'becomes' a virtual team (Zigurs, 2003). Virtual working offers benefits to both organisations and individuals. Benefits to the organisation include:

- people can be hired with the skills and competences needed regardless of location;
- in some cases working across different time zones can extend the working day;
- it can enable products to be developed more quickly;
- expenses associated with travel and relocation can be cut; and
- carbon emissions can be reduced.

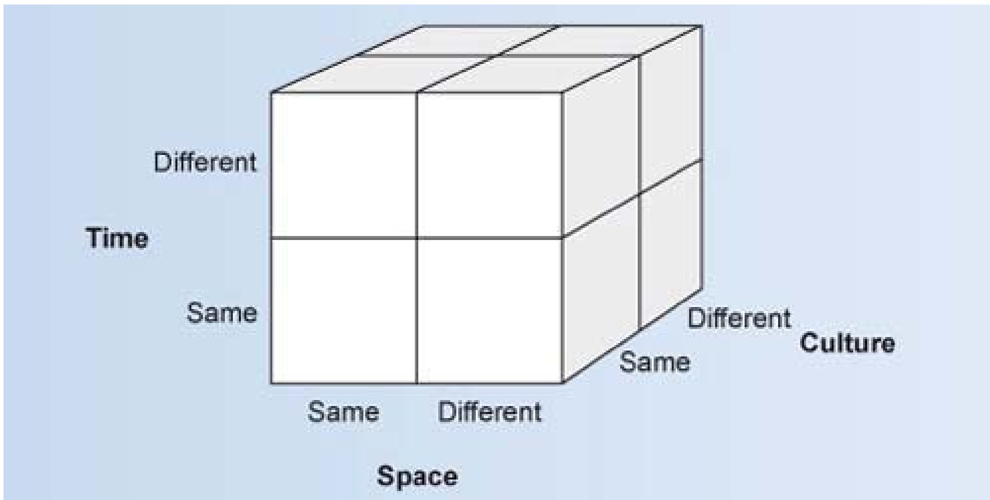
Benefits to the individual include:

- people can work from anywhere at any time;
- physical location is not a recruitment issue;
- travelling expenses and commuting time are cut; and
- relocating is unnecessary.

CHARACTERISTICS OF VIRTUAL TEAMS

Several ways of characterising or classifying virtual teams have been proposed in the literature. One of the most popular was elaborated by Fisher and Fisher (2001), who argued that virtual teams typically can be characterised by three variables, or dimensions. These variables are time, space and culture, although other authors also refer to the third variable as organisation. Thinking about these three variables as dimensions enables us to draw the diagram shown in Figure 4.

Figure 4 - The space, time and culture classification of virtual teams



(Adapted from Kimble et al., 2000)

Understanding these three variables is useful in determining what kind of virtual team you might be involved in and in helping you decide on appropriate actions to improve them. For example, a team that has members working in the same place at different times (such as an operational team providing telephone services in a bank) might be able to meet some of their communication needs using noticeboards in their shared office space, but a team that is distributed across multiple sites or time zones would need a different communication strategy.

Time refers to *when* people work. Virtual team members may be assigned to work different hours, on different shifts or on different days. They may work at the same time, but be in different time zones, so the time when their working day overlaps with other team members is short.

Space (or place) refers to *where* people work. Virtual team workers may work close to one another or at a distance. They may share the same office or work in different places in the same building. They may work in different buildings, in different towns, or even in different countries.

Culture (or organisation) refers to *who* people work for and *how* people work together. Aspects of culture include language, race, nationality, profession, education and gender, as well as religious, political, social and economic factors.

In Figure 4 in the continuum was divided into just eight boxes, to represent eight types of team, depending upon whether the time, space or culture variable is the same or different.

So, for example, in the bottom left corner of the diagram you would place teams that work at the same time, in the same place, for the same organisation. In contrast, at the top right corner of the diagram are teams whose members work at different times, in different places, for different organisations.

Two of these boxes – the same time, same space, same organisation teams that we have already discussed, and the one behind it in Figure 4 (same time, same space, different organisation teams) – are not virtual teams according to Fisher and Fisher (2001). You may disagree with this viewpoint, but a team consisting of people working for different organisations (or cultures) but who work at the same place and at the same time may not need technology to mediate their interactions, although they may prefer to operate virtually. They should be able to meet in the same room even if they need interpreters or other intermediaries to facilitate their interactions.

To help you think about the different types of team and the implications of the three variables for teams of different types, we have partially completed Table 3 with examples of virtual teams and the potential challenges that are implicit in these variables. We have put an example team and a team challenge in each row, but some examples and challenges can be placed in more than one row. Identify them. There are other examples and challenges that do not appear in the table. Identify some of them.

Table 3 - Examples of virtual teams

Type	Time	Space	Culture	Example	Challenges
1	Different	Same	Different	Customer Service Team	Interaction between organizations or cultures
2	Different	Different	Different	Global Team	
3	Same	Different	Different	Regional Services	
4	Different	Same	Same	Warehouse Team	Interaction between shifts
5	Different	Different	Same	Multinational Organization	
6	Same	Different	Same	Regional Centres	Interaction at a distance
7	Same	Same	Same	Project Team	Not a virtual team
8	Same	Same	Different	Contract Team	Not a virtual team

(Based on Fisher and Fisher, 2001)

Discussion

Type 1 and Type 4 teams differ in whether or not team members come from the same (Type 4) or different (Type 1) organisations or cultures. Both types of team are typical of customer service, manufacturing or warehouse teams that have multiple shifts of people using the same space to provide the same service or function, but working at different times. In practice, these two types of team can use non-technical means to communicate with each other, such as leaving notes or writing on shared noticeboards. Many teams in this situation use overlapping shifts to provide face-to-face meetings and facilitate shift handovers.

A typical Type 2 team could be an international product development team, a multinational organisation or a global project team. Again, Type 2 teams are similar to Type 5 teams, differing only in whether team members work for the same organisation or have similar cultural backgrounds. In a world that is becoming increasingly globalised, teams of this type are becoming increasingly common. For example, in order to speed product development and reduce time to market, teams are being formed with members that are located in countries distributed roughly eight hours apart around the globe. At the end of the working day in one location, the work in progress is handed on to team members who are just beginning their working day, eight or so hours behind them. Teams of these types are the most difficult to manage and work in because they cross time and space, and potentially organisation. Team members must become proficient in using asynchronous technologies such as email or shared workspaces. Since times when synchronous communication by audio or video conferencing can take place will be limited, such meetings that do take place by these means must be used very efficiently.

Many virtual teams are of Types 3 or 5, consisting of people who work at different locations but for the same (Type 5) or different (Type 3) organisations. These could be regional sales teams or teams providing other regional services. Such teams have the benefit of working at the same time so they can work remotely, in real time, using synchronous technologies. Face-to-face interaction is difficult since the team members are normally working at different locations, so they will have to travel to meet in the same place.

Finally, Type 7 and Type 8 teams are included in the table for completeness. These are not virtual teams. From your own or others' experiences, you might like to add further examples, or note down team challenges typical of conventional teams.

Managing and Facilitating Virtual Teams

Challenges for virtual groups include communicating effectively across distance, which may involve learning how to make full use of all of the communication technologies available to the group in question.

A typical mistake when moving to virtual working is to believe that only small adjustments to established working practices will be required. This may result in managers failing to think through and plan for working virtually; this can result in reduced performance and heightened stress among team members. Successful virtual working means analysing and agreeing on communication practices, using the communication technologies available and building trust in the virtual team. Although dependent on technology, virtual teams are more likely to fail through lack of the development of 'soft skills' (that is, the social processes).

Guidelines for managers in helping teams through virtual team-working processes are set out throughout the rest of this topic.

Trust

As with conventional teams, the building and maintenance of trust between members is vital. Ways to facilitate the building up of trust include:

- initial face-to-face start ups (with team-building activities) periodic face-to-face meetings;
- visits to each other's workplaces;
- establishing clear codes of conduct and ground rules;
- recognising and publicly rewarding performance;
- taking care with the tone and language used in emails to reduce the risk of being misunderstood;
- ensuring that team roles are made clear to everybody;
- discussing and clarifying team goals; and
- making use of conference calls for in-depth discussions.

Accountability

Associated with trust is the accountability of individual team members. This needs to be based on agreed measurable outputs not on 'presentism'–that is, joining in communication without making any significant contribution.

TEAM BUILDING

Virtual teams need a clear and distinct team identity. When an organisation creates a face-to-face group, the organisation's day-to-day processes give it identity; for example, the room bookings system says 'Supplier Payments IT Team 14.00 –16.00'. The meeting's agenda includes items such as 'Report from the Supplier Payments IT Team'. Members of the Supplier Payments IT Team also identify with the team; they see themselves as part of the team.

The external identity of virtual teams is often less visible than in the above example, and there may be less opportunity for virtual teams to build their own identity. Ideas for helping a virtual team build an identity include:

- using visual material and photographs in communications;
- having a message board and photos of team members with some biographical background;
- designing a team logo;
- celebrating successes with the whole team;
- sending out news items on matters of interest for the whole team; and
- having a team blog.

SUMMARY

Virtual teams can be characterised by the three variables, or dimensions, of time, space and culture, although the third variable is sometimes referred to as organisation. This classification enabled six types of virtual team to be identified (two of the classes in the classification are not strictly virtual). The classification can be used to identify different types of virtual team and to help you decide on appropriate actions to take to improve them.

TOPIC 2.3 – TEAM FORMATION

INTRODUCTION

How do teams form? Are there any common patterns in the way in which they develop? It turns out that there are. In this topic we shall discuss one of the more widely known models of team formation and development – Tuckman's model (after the person who described it). This model is also frequently referred to by the stages of team development that it identifies: forming, storming, norming, performing and adjourning.

OBJECTIVES

Upon completion of this topic you should be able to:

1. Employ Tuckman's model of team formation.
2. Examine the life cycle of a team.
3. Explain the strategies for each phase.
4. Describe the impact of each phase of team formation on management personnel.

OVERVIEW OF TEAM FORMATION

Teams often come together in order to carry out a project or undertake a task that is too large, complex, or would take too long for one person to complete. While the team may be involved in producing a finished product or an end result, it can also be thought of as being engaged in a process that has a beginning, middle and usually an end. The team is formed at the beginning of the project, it carries out the project, and at the end of the project it may or may not be disbanded. Teams rarely come into being fully fledged; they usually have to proceed through a number of stages of development before they function well together as a team.

These developmental stages can take some time to pass through before a group of disparate individuals begins to operate effectively together as a team. Unfortunately, time is something that many teams don't have. They may have tight delivery deadlines imposed upon them, leaving little spare time for preliminary 'ice-breaking' activities to help team members to get to know one another during the initial stages of team development. In virtual teams, this lack of time is particularly unfortunate since it has been found that such teams often take longer to develop than teams that are collocated or can meet face-to-face (Lipnack and Stamps, 2000). One of the reasons for this is to do with the nature of the communication mechanisms used (electronic communication rather than face-to-face meetings, often using email instead of telephone calls or video conferencing). All teams can take a long time to develop if team members are juggling participation in the team with their normal duties and other competing priorities, rather than being assigned to a team as a full-time member. This situation, where team membership is part time, often occurs in virtual teams.

The life Cycle of a Team

This section covers the stages that teams normally go through, from forming to disbanding. Note that the stages cannot always be clearly identified: this is likely to be the case if a team operates for a few days or

if a team has changes in its membership. In the first case, there may be little 'storming' and in the latter there may be a considerable amount of it.

Managing a team means managing it through the ups and downs of the team process from beginning to end. The idea of different 'stages' of team development is useful in understanding what the team needs and how best to provide support. The stages of team development were most famously described by Tuckman and Jensen in 1977. They are:

- **Forming**: the pre-team stage where people are still working as individuals.
- **Storming**: the stage of conflict that many teams need to go through to achieve their potential. During this stage the team becomes more aggressive and challenges previously agreed or taken-for-granted rules and restrictions.
- **Norming**: the consolidating phase in which the team works out how to use the resources they have to apply to the task.
- **Performing**: the optimal stage in which the team works well and strives to be even better by concentrating on the development of the team, individuals and the task in hand.
- **Adjourning**: (Sometimes also referred to as 'mourning'). This stage is when the team disbands and individuals move on to other responsibilities.

Stages in the Development of Teams

Many teams appear to develop in the same way and to follow a predictable pattern of formation and growth (their life cycle). As a member of a team, if you know what the pattern is and can recognise the features of the developmental process in your own team, then you are in a strong position to be able to do something about it – if indeed you need to. First, you can understand what is going on – the growing pains of your team; second, you can take appropriate action to help your team to move on to the next stage of growth; and third, you can try to avoid doing anything inappropriate to upset the development of your team!

We will now explore the stages that teams normally go through, from forming to disbanding. Note that the stages cannot always be clearly identified: this is likely to be the case if a team operates for a few days or if a team has changes in its membership. In the first case, there may be little 'storming' and in the latter there may be a considerable amount of it.

Managing a team means managing it through the ups and downs of the team process from beginning to end. The idea of different 'stages' of team development is useful in understanding what the team needs and how best to provide support.

In 1965 Tuckman published a paper in which he identified and characterised four stages of team development (Tuckman, 1965). Later on, Tuckman and other authors added a fifth stage to the end of the team development life cycle (Tuckman and Jensen, 1977). Tuckman's model formalises the process of team development and gives names to the different developmental stages. These stages have been given other names by other authors but they are widely recognised as being ones through which many teams pass. In the remainder of this section, Tuckman's model of the development of teams is described. Furthermore, we have included some advice for virtual teams to consider at each of the five stages.

FORMING

In the first stage of team development, team members meet (either in person or electronically) and begin to get to know each other. Often, team members will begin to establish the ground rules for how the team is to operate and how they will work on the task that the team has been assigned. It is tempting to skip or rush this stage in team development because it does not appear to contribute directly to the project outcomes. However, you should recall that this 'forming' stage is an important part of the team development process without which effective communication is unlikely to be possible within the time available to the project.

Features of this Stage

- Team members try to get to know each other. In collocated teams, this often takes the form of a workshop with ice-breaking and social activities that are designed to help the team members to get to know one other. Facilitators with experience of building teams may be brought in to run these introductory workshops.
- The team attempts to understand the task or project that they have been assigned. This understanding will include trying to scope and define the boundaries of the task.
- Individuals within the team will be trying to work out what role they want to play in the team, and what roles they want other team members to play. For example, you might be asking yourself 'who do I want to lead the team?' and perhaps 'who do I *not* want to lead the team?'.
- As well as establishing what roles team members will take on, the team will also begin to establish some rules by which the team will operate.

Advice for a Virtual Team

Individually, you may experience some anxiety and uncertainty over what the project involves, what the other team members will be like, and frustration over the slow start to the project. Often, there is a feeling of wasted time since there may appear to be little progress on the task that the team has been set. But please be patient. It does take time for people to get to know one another, to begin working together and to build up levels of trust with one another. Time spent on this stage can be recouped later through more effective communication.

STORMING

As its name suggests, this stage in team formation can be characterised by spirited discussions and even arguments amongst the team members. While the storming stage can be difficult, it is sometimes the case that intense discussion during this phase of team development leads to more productive working later on in the project. In other words, the team has worked out its differences early on and has developed mechanisms for managing discussions and arriving at satisfactory conclusions when disagreements occur.

Features of this Stage

- A feeling of lack of progress on the task can trigger this phase of team development. Often, the first deadline that the team has to meet is looming and team members realise that the task is harder than they thought. This puts pressure on the team and the initial politeness and diffidence in addressing one another is lost.
- Sometimes, differences of opinion over the task can arise, and individuals' personalities can clash as team members overcome their tentativeness and begin to assert themselves. Team members can even become hostile as a way of expressing their individuality in a reaction against the team culture that is beginning to form. Or they may question the role they have been asked to perform in the team, or the tasks they have been given.
- Discussion often centres on team process issues, such as team rules (how the team is going to operate) and team roles (who is in charge and who is going to do what).
- There may not be much progress on achieving the project goals (outputs)!

Advice for a Virtual Team

In an online, shared discussion forum, it is easy for members who feel that they are on the receiving end of unwarranted or personal criticism to become defensive. Unfortunately, this can lead to them withdrawing from the discussion until the debate has become less heated and less personal. It may require a personal, private approach (via email or a phone call rather than in an open discussion forum) to bring them back into contributing to the team.

When communicating by electronic means (particularly if you can't hear or see the recipient), you lose much of the feedback about how your message is being received, since a person's tone of voice and their body language are very expressive and reveal much about their emotional state.

NORMING

When teams are over the storming stage they often breathe a collective sigh of relief, since the team has begun the transition from a group of individuals to becoming members of a cohesive team. A team identity has established itself and disagreements between team members are largely settled.

Features of this Stage

- The team should reach agreement upon the process issues that it may have begun debating in the previous phase of team development. Specifically, the team should agree the ways of working and interacting with each other (team rules), and individual team members should agree to the roles that they are going to take on in the team and the tasks that they will perform (team roles).
- The team also reaches agreement upon the nature of the task and how they are going to tackle it.
- With their growing sense of identity and purpose, the task ‘belongs’ to the team and is not something that has been imposed upon them. The team often develops its own common language to facilitate communication within the team.
- There is real progress on the task that the team has been assigned.

Advice for a Virtual Team

A useful team rule to establish is how frequently team members should check the team forum and their personal email for messages. This depends on how much time you are devoting (or expected to devote) to the team tasks. If you are in a work situation and the team’s work is your major task then you might need to check for messages from the team several times a day. If you participate in the team in your spare time then less frequently, perhaps once or twice a week, may be enough.

It is also useful to establish when individual team members will be able to contribute to the team – their typical working patterns. This helps other team members to know when and how to contact each other, potentially reducing discord within the team.

Check that each member of the team has a common understanding of the team tasks, and that everyone is clear about the team rules and language.

Performing

Having completed or passed through the previous three stages, the team will be working productively together. They will be getting on with the task, producing results, and there will be good working relationships within the team.

Features of this Stage

- The focus of the team has shifted from team process issues to the task that the team is undertaking.
- Individuals within the team know how to work with each other and how the team as a whole operates.

- The team is in a much better position to solve problems as they arise, rather than being thrown into disarray by unanticipated problems.
- There is a lot of progress towards the final project goals.

Advice for a Virtual Team

In a virtual team, you lack many of the informal cues that are important for keeping a team working productively and easily together, such as how busy someone is, what they are working on and when they might be on holiday, ill, or otherwise unable to contribute to the team.

Instant messaging software such as AOL Instant Messenger (AIM), Windows Live Messenger (otherwise known as MSN) and Yahoo! Messenger can be used to indicate team members' availability and willingness to communicate. These indicators can be used to give a sense of the presence or an awareness of other members of the team in their physical absence. A more recent phenomenon that of the Web 2.0 website Twitter, can provide a similar function: short updates on what a team member is doing, or thinking, at any moment in time.

In the absence of these tools, an alternative or supplementary approach to using software that gives presence and awareness cues is just to give rather more explicit indications of how you are progressing. For example, it is helpful to your other team members to let them know when you will be unable to contribute to the team's work because of holidays or other time commitments.

ADJOURNING

This, the final stage of team development, is sometimes called 'mourning'. While it was not in Tuckman's original (1965) proposal, it is widely recognised as being an important stage in the life cycle of a team, as team members anticipate the project coming to an end and the team being disbanded.

Features of this Stage

- The team may become even more effective as it makes a concerted effort to complete the task before the final deadline. However, there is a possibility that the team could become less effective as members regret the end of the task and the breaking up of relationships that have formed between the members of the team.
- The task is completed, the project comes to an end and the team disbands.

Advice for a Virtual Team

In order to overcome this stage, try to identify some means of moving on, of keeping in touch and of keeping working relationships going, perhaps by something as simple as agreeing to keep in contact by email, or creating an archive as a permanent record of the work the team has done together.

The Role of the Manager in the Team Life Cycle

Managing a team means managing it through the ups and downs of the team process from beginning to end. The idea of different ‘stages’ of team development is useful in understanding what the team needs and how best to provide support.

Manager’s Role During Forming

Your focus is to help the team members to get to know each other and put everyone at ease. Minimise fears, confusions and uncertainties by clarifying the goals, roles, responsibilities and relevant procedures. Discuss concerns and expectations: team members who have worked in teams before may bring specific expectations, worries or prejudices.

Manager’s Role During Storming

Listen to problems, provide feedback which acknowledges all points of view, and encourage the team to work towards shared goals. Attempts to suppress conflict are likely to disrupt team processes. The storming phase is really an opportunity to resolve conflicts and, if carefully managed, can help the team become more cohesive.

Manager’s Role During Norming

Ensure that rules and norms are arrived at by consensus and that they help the team’s effectiveness. Time given to the creation of new rules by which the team wants to operate will make later stages more efficient. Facilitate team cohesion and ensure that each team member identifies with the team’s purpose and values.

Manager’s Role During Performing

Evaluate team effectiveness by looking at individual and team efforts, satisfactions and successes. The team will be concerned with productivity, efficiency and potential. Praise the team for its successes. It is preferable to reward the team rather than individual team members in order to promote harmony and cohesion. Rewarding individuals can lead to competitiveness and hostility.

Manager’s Role During Adjourning (or mourning)

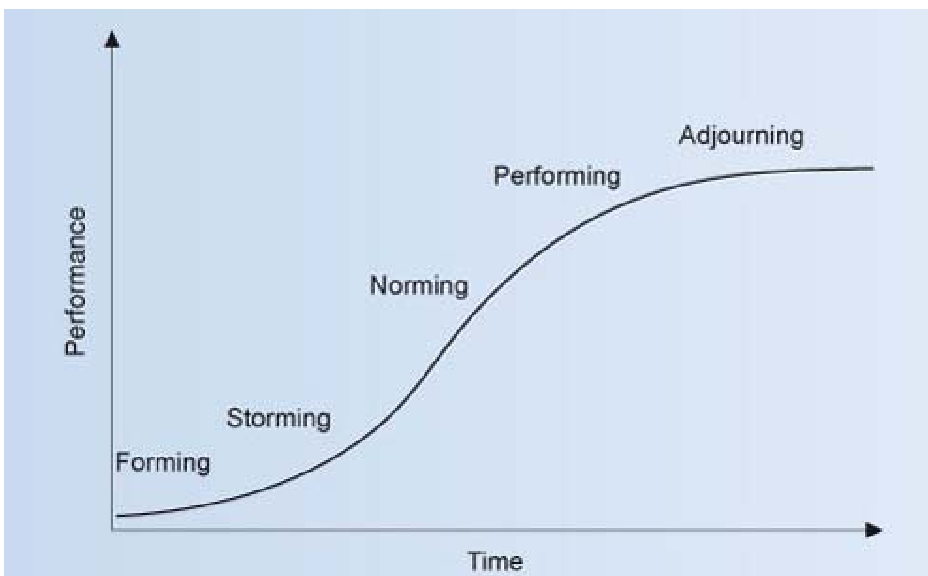
Provide feedback on how well the team has done, what team members have learned and how they are likely to cope with new challenges. If it is appropriate, encourage team members to maintain links with each other and develop their relations through new activities and projects.

Tuckman and Jensen’s team stages are not always so clearly defined. For example, if new members join during the project, the team may need to return, at least in part, to the forming stage while performing at the same time. A variety of other changes may cause storming in well-established teams. However, the idea of team stages can be useful in anticipating what kind of support a team may need at a particular time.

IMPLICATIONS OF THE TEAM DEVELOPMENT MODEL

Generally, significant progress on a team's tasks does not occur until the norming stage. This is captured in Figure 5, which shows how team performance (in terms of progress towards the final goal, plotted on the vertical axis) varies according to the stage of development of the team (plotted on the horizontal axis in terms of time). The graph is intended to give you only an impression of how teams perform so it should not be interpreted too literally. In particular, teams do not spend an equal length of time at each stage of development. In some teams, team performance may even drop during the storming stage as the team undergoes the sometimes painful transition from being a group of collaborating individuals and becomes a team (Becker, 2003).

Figure 5 - The S-Shaped Curve of Team Development



(Adapted from Lipnack and Stamps, 2000)

It is instructive to compare this view of the development in team performance over time, as a team progresses through the different stages of team development, with the formation of high-performing teams proposed by Katzenbach and Smith (1993). These authors suggest that team effectiveness increases as teams move through phases of team development, from a working group to a high- performance team as illustrated in Figure 6. When comparing Figures 5 and 6, you should note that Figure 5 shows the development of team performance over time, whereas Figure 6 shows the development in a team's performance in terms of their effectiveness.

Figure 6 - The Team Performance Curve

(Redrawn from Katzenbach and Smith, 1993)

Tuckman's model of team development has a number of other implications and consequences of which it is useful to be aware:

- The duration and intensity of the different stages can vary between teams. Some teams may have a very smooth and rapid passage through the first few stages of the model whereas others may have a much more difficult passage.
- Teams usually have to progress through the earlier stages of development in order to reach the performing stage, so don't become discouraged if your team doesn't work too well at first.
- It is possible for a team to return to a previous stage of development. This may happen if new and significant issues arise in the team, or if team members leave or new members join the team.
- A team may never complete its journey through the five stages of development. If the team is together for only a short time, if it has taken a long time to develop, or if the team has returned to previous stages of development, then it may never reach the performing stage of team development.
- The model has been presented in terms of a series of discrete, identifiable stages. However, the stages may merge into one another or be repeated as issues recur or new ones emerge.

From the above discussion it would be very easy to think that there is a need to manage the process of team formation by actively intervening if the team does not appear to be moving on to the next stage of development. Often, a more task-oriented approach, of letting the team evolve by focusing attention and energy on the team task, is more effective. It has even been found that teams that devote excessive attention to their own development are less productive and enjoyable to work in than those that do not. Therefore, the skill in facilitating team development is to know when, how, and if at all, to intervene in building the team.

The five stages are: forming, storming, norming, performing and adjourning. In the first stage, forming, team members primarily get to know one another and do little towards meeting the goals of the project. This stage can be thought of as socialisation. In the second stage, storming, spirited discussions and arguments amongst the team members occur, but these lead to the team developing mechanisms for managing discussions and arriving at satisfactory conclusions when disagreements occur. Some significant progress towards the team goals can occur in this stage. However, most progress occurs in the third stage, norming. In the norming stage the team members' transition from a group of individuals to becoming members of a cohesive team. In the fourth stage, performing, the team will be getting on with the task, producing results, and there will be good working relationships within the team. The final stage, adjourning, is where the team has completed the tasks and disbands.

Summary

In this topic we have given some advice and guidance on how virtual teams develop based on Tuckman's model of team development. Understanding the stages by which teams develop can help stop a team from overreacting to normal problems that arise in teams as members learn to work together, to cooperate and collaborate in completing the task that they have been set. But in common with other situations in which you are working with people, patience is essential.

TOPIC 2.4 – TEAM ROLES

Introduction

The three different types of role that people can play in the team – technical, functional and team roles. The first type of role someone plays in the team is that of undertaking the team task; in other words, working on the task that the team has been assigned is known as their technical role. The second type of role consists of the tasks that are required to make the individual members of the team function effectively as a team (a functional role). In this topic we shall turn our attention to a person's functional role in a team. The third type of role that a person can play in the team, a person's team role.

Objectives

Upon completion of this topic you should be able to identify and assign different team roles to each member.

Overview

Working on the process of team organisation and management often appears to be of secondary importance when compared with that of working on the task and meeting deadlines. However, ensuring that team members work constructively together will prevent the team from drifting aimlessly, sometimes acrimoniously, without getting much goal-oriented work done.

Some of these *process*-related tasks are best defined and carried out by team members having particular roles. In the remainder of this section we will describe these roles, and give recommendations as to how these roles can be allocated and which roles you should have in your team.

Earlier we explored some typical team roles. Now let's look some other roles.

Allocating Team Members to Roles

Teams needs to agree on who is going to carry out which role (role allocation). This need not be fixed for the lifetime of the team, particularly in operational teams. You could, for example, rotate the roles so that everyone takes a turn and thus gains experience of the different roles (as in some forms of democratic team). Or you may want to allocate the crucial roles within the team to the people who would like to take them, are best qualified to carry them out through prior or current experience, or even to people who would like to take on an unfamiliar role in order to gain experience of performing that role.

Whatever protocols you use for allocating roles within your team, you should make sure that someone performs these roles or, if the roles are not allocated explicitly, that someone in the team undertakes the tasks.

TEAM LEADER

Even where decisions may be taken by the whole team, someone has to take responsibility for chairing meetings, or their virtual equivalent. In a meeting, this person has responsibility for clarifying the aims of the meeting and its agenda. They should introduce each item on the agenda, guide the discussion of the items and then summarise the discussion and decisions taken. If the team leader has a strong leadership role they will also have a key role to play in decision making, partitioning of tasks and allocation of activities.

RECORD KEEPER

A team needs someone who takes notes in meetings: a team secretary or record keeper. One of their duties is to keep a record of what decisions have been taken, who is doing what, and the date of the next meeting. A summary of the meeting, in the form of meeting minutes, will normally be circulated to the rest of the team by the record keeper. Therefore, the minutes of the meeting can be seen as the official record of the meeting and can be referred to if decisions are revisited or are in doubt. In the virtual team setting, the easiest way to emulate this decision-making function of the meeting is to set a deadline by which an issue must have been debated and a decision made, by voting if necessary. The team leader can facilitate this process, with the record keeper recording the decision that is made.

In some operational and project teams, keeping records of issues (or bugs in computer software) is a significant record-keeping task. Special ‘issue tracking’ software has been developed that is often used by helpdesk teams or those working in customer support departments to manage records of issues reported by customers and their resolution. Project teams engaged in software development might well use a related type of software – bug-tracking software – to help manage records of errors found, and the steps taken to resolve them, in the software they are developing.

DOCUMENT CONTROLLER

In project teams, the record keeper may coordinate the production of team documents and reports through managing the different versions of the documents that the team produces. Or this role could fall to the team leader. If production of documents is a large task or requires knowledge skills that are held by those with technical roles other than record keeper, then the role of document controller is needed. While many projects do not have documents as their end-products (projects in the construction industry and many information technology projects, for example), most teams will have to produce periodic reports on their activities.

PROGRESS CHASER

A team needs someone who is responsible for ensuring that the team is keeping to the schedule that the team members have set themselves and ensuring that they will meet the external deadlines that have been given to them. Such a person should monitor progress, ensuring that everyone is doing what they are supposed to and that all the tasks that need to be completed by a particular date are on schedule before the deadline and have been completed once the deadline has passed.

In a small team this may be undertaken by the team leader. In a large team the role of progress chaser may be supported by a timekeeper who monitors how much time is spent on each item in team meetings. In synchronous meetings it is easy to spend too much time on the first few items of a long agenda, leaving too little time to discuss the later items. A timed agenda allots time to each item. In asynchronous collaboration a similar function may be needed, although usually an end-time is set for each asynchronous discussion. In this case the timekeeper may need to allocate periods for discussion and ensure that these are coordinated with the milestones of the project.

SUMMARY

In this topic we have discussed the different functional team roles that team members can take on. In a small team, you may not need all of these roles all of the time, and the same person may fill more than one team role. However, the four functional team roles described above – of team leader, record keeper, progress chaser and document controller – are four roles that commonly are fulfilled by team members.

TOPIC 2.5 – TEAM DECISION MAKING

INTRODUCTION

A theme within this unit is the development of skills and techniques that are useful to team members as individuals, as team leaders and as team managers. Many of these skills are useful in other contexts, and you may have studied them as part of management or other professional development courses. In this section we consider two aspects of working in successful teams – decision making and trust – and how these can be more complicated in a virtual environment. By way of motivation, in Coar's (2003) article 'The sun never sets on distributed development', he notes that one of the consequences of relying on email or other asynchronous communication media is the difficulty of coming to conclusions or reaching a consensus.

OBJECTIVES

Upon completion of this topic you should be able to:

1. Employ an appropriate decision making process.
2. Explain the steps in making appropriate decisions.
3. Examine different methods of making decisions.
4. Employ effective team communications and develop team trust.

OVERVIEW

Activity 4 – Decision Making

Revisit a recent decision you, or a team you are working in, has made. Look back on it as though you were once again in the position of having to make the decision. Write down some brief answers to the following questions.

1. What techniques (if any) did you use in determining what the problem was? Do you think they were effective?
2. What information did you have at the time?
3. What information do you now think you should have had before making the decision?
4. What alternatives did you think you had at the time?
5. Are there any additional alternatives you can think of now that you didn't consider but wish you had?
6. How did you evaluate these alternatives then, and how would you evaluate them if you had another chance?
7. How did you know when a decision had been reached?
8. If the decision involved electronic communication, either to gather information, to make the decision or to communicate it, were any additional steps required to ensure the process was completed?

Record your responses in your course journal.

Discussion

While the answers to these questions will depend on the example that you chose, it is common to look back and recognise where there was insufficient or incomplete information at the time a decision was made. If this was not the case perhaps explicit steps were taken to ensure appropriate information was available.

Electronic communication can add an additional level of complexity to decision making. To ensure that all steps are complete in a virtual environment it is necessary to:

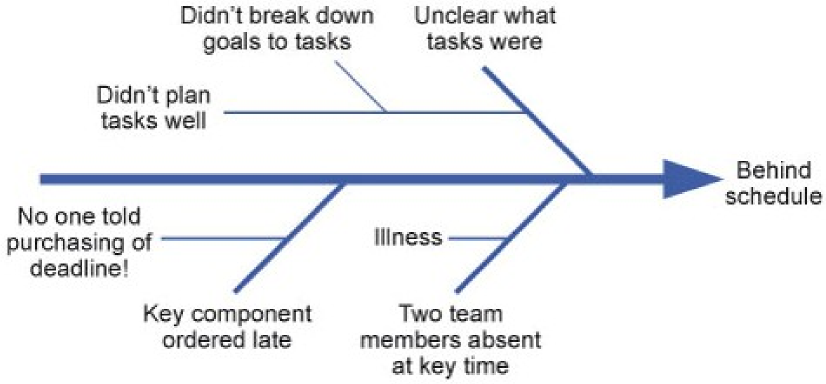
- identify what decision it is that needs to be made and, if this requires examination of a problem, consult with all stakeholders to do this;
- ask for, and set deadlines for receiving, information from all relevant parties;
- ask for a 'nil return' if there is no information to send and chase if no response is received;
- evaluate appropriate techniques for considering alternatives and evaluating them;
- ensure that all relevant people are party to this; and
- ensure there are explicit methods for making the decision, for recording it and communicating it to relevant parties.

Preparing to Make a Decision

In an environment where the outcome of a decision must be made by a group of people, or even where it must be made by one person but affects others, it is important to prepare before reaching a decision. The following list sets out steps that should reasonably be taken before making a considered decision.

1. Set a deadline by which time the decision must have been made. Communicate the deadline to everyone involved and then enforce this deadline.
2. Ensure that the problem is defined and that the required decision is clearly expressed. Avoid making a decision about a symptom (for example, 'we are late') when a decision about a problem is needed ('we need to improve our planning'). Figure 7 shows a simple cause-and-effect diagram to find the reasons for a symptom. Whilst this shows quite specific reasons, it points to a general lack of proper planning. In this example, the symptom 'Unclear what tasks were' was in turn caused by 'Didn't plan tasks well', which in turn was caused by 'Didn't break down goals to tasks'. A line is drawn from each cause to a more specific cause.
3. Determine options for solving the problem. For each option determine its benefits and any problems it may cause; for example, an 'ideal' solution may take too long if you are under pressure and would be discarded as a result. Options can be ranked according to their feasibility and their desirability.

Figure 7 - Reasons For a Project Being Behind Schedule



Reaching a Decision

Making a decision can be, and often is, difficult, particularly if it involves reaching some accommodation or agreement with others, as it does in working in a team. There follows four decision-making models to reach a decision when a group of people is involved. However, first the group has to decide which model to follow.

Autocratic

The autocratic form of decision making applies where one person, usually the team leader or team manager, has the formal authority to take a decision to which others will be bound, or else one person has the personal charisma or personal authority – delegated to him or her by the other to make decisions on the group's behalf. The drawback, particularly when a decision is taken without consultation, is that some or all of the group can be alienated.

Majority Rules

Majority rule doesn't mean that everyone agrees, but the decision is based on a majority vote. The drawback of this model is that it is possible to become deadlocked if there is no majority: half for and half against. Should that occur, there needs to be some mechanism for breaking the de

Majority Rules with Minority Opinion

This occurs where there is agreement for majority rules but the minority feels strongly enough about their side of the argument to wish to make known their disagreement. To do this, the minority writes what is known as a dissenting opinion: it states what a different outcome could be and the arguments as to why that outcome gained their support. In a team, if a minority feels sufficiently strongly about their view, allowing the minority to prepare a short report for inclusion with the main decision of their views and reasoning can be useful for group cohesion, and may also prove valuable should the group need to revisit the decision in the future.

Consensus

The term consensus describes the quality or condition of being in complete agreement or harmony. In any group of more than a few, reaching a consensus requires a number of conditions or actions:

- being willing to accept that rejection of one's own proposals or ideas is not equivalent to rejection of oneself and does not demean one's worth within a group;
- striving to find, in discussion with the other members of the group, areas of common agreement;
- ensuring that those who don't initially agree have a chance to have their say;
- ensuring that everyone has the chance to think about their response to counter-suggestions, changes in wording, and so on;
- seeking to build on areas of agreement to achieve even wider agreement;
- willingness to continue the discussions in this vein until a consensus is reached; and
- communicate as a decision only that which is supported by the consensus.

A chairperson is required to manage discussions, whether face-to-face or electronic. The chairperson needs to:

- ensure that everyone has a fair say (both by asking those who dominate a discussion to give way to others and by inviting those who seem reluctant to join in to express their views);
- ensure that personality clashes don't occur or are quickly diffused by reminding the participants that the discussions are intended to reach a consensus, not score debating points; and
- remind the participants of the value and importance of goals to be reached.

These points apply as much to online discussions using email and conferencing software as they do to face-to-face sessions amongst participants.

Trust in Teams

Trust between team members is an important ingredient for effective and efficient team working. But what is trust? According to Gignac (2005), trust is:

> *… a willingness to increase your vulnerability to another person whose behaviour you cannot control, in a situation in which your potential benefit is much less than your potential loss if the other person abuses your vulnerability.*
>
> Gignac (2005, p. 62)

Put another way, trust can exist when the members of the team are working in good faith, honouring their explicit and implicit commitments honestly, without taking advantage of other members of the team.

The benefits to a team if its members trust each other have been put succinctly by Fleming (2006), who claimed that trust was vital for any team to be successful. If team members trust each other, this can help to develop cooperation and collaboration between team members through the sharing of knowledge and experience. Trust between team members can also encourage them to be open and honest with each other. In the team context, it can promote new ideas and risk taking.

Conversely, mistrust within the team is burdensome because it leads to increased formality of procedures in order to reduce team members' vulnerability to each other. If there is a lack of trust within the team, effort can be duplicated because team members do not trust each other to deliver on their promises. This can lead to increased checking up on members of the team and increases in their workload at the expense of the overall productivity of the team. Team members' actions and interactions within the team can also become diverted into unproductive political activity, further lowering productivity within the team. Finally, negotiations within the team and with the client can become protracted. All in all, teams that don't trust each other are uncomfortable environments in which to work.

Building trust in virtual teams is not easy, and maintaining trust and group cohesion can also be difficult if it is done purely at a distance.

SWIFT TRUST

In a seminal paper on the subject of trust in global virtual teams, written by Jarvenpaa and Leidner (1999), they quote a paper by Nohiria and Eccles (1992), who argue that 'face-to-face encounters are considered irreplaceable for both building trust and repairing shattered trust'. In contrast, Lipnack and Stamps (2000) are more upbeat on the possibility of building trust online, preferring to consider that trust can be built more quickly face-to-face than at a distance.

This leads to the concept of swift trust, which refers to the way that virtual teams can work together fairly quickly once they are able to develop trust between team members. Swift trust is important because virtual teams are often put together for short-term task working before being disbanded and re-formed with different team members for another task. The 'crisis' element of the work means that there may be little time available to achieve the objectives set.

Not surprisingly, if group members have worked together before this helps to establish swift trust. Cooperation and trust can also be improved if members make a tangible contribution early on, such as a fast response to messages or the prompt completion of a task.

TEAM COMMUNICATIONS

Choosing the communication technologies that you are going to use is important to the effective progress towards team goals, but so is deciding upon how you are going to use them, so that you can communicate and collaborate effectively with other team members. Some of the issues that can arise include the following.

1. The difficulty of scheduling synchronous meetings. Given the complexity of working with people who may be in different time zones, or working for several teams, it is likely that team members may have such different and busy schedules that it may be difficult to schedule a time when the whole team may be available for a synchronous meeting. Consequently, it may be easier to collaborate using asynchronous communication media such as email, wikis and forums, where team members can contribute at a time which suits their own schedules. If the team does arrange synchronous electronic meetings, then good minutes (or notes) of the meeting should be taken so that those people who were not able to participate in the meeting know what was discussed, and the decisions that were taken (just as you would at a face-to-face meeting in the workplace).

2. Recognising that progress may be slow for a variety of reasons. You may find yourself waiting for someone else to complete their part of the project before you can move forward to the next stage. If so, please be patient. Alternatively, if other members of the team are waiting for you, please keep them informed of your progress. It can be extremely frustrating not knowing what progress is being made elsewhere, especially when deadlines are looming.

3. Allowing extra time for decision making. In full-time work, meetings can be a significant decision- making tool. Given the difficulty of organising meetings (see the first point above), decisions will probably be taken by more protracted asynchronous discussions. This will tend to slow down the decision-making process because you will have to wait for members of the team to read, and respond to, messages posted to asynchronous forums. One way in which you can help to keep the decision-making process moving forward is to set (sensible) time limits by which every team member should have read, and responded to, issues posted for discussion so that decisions can be taken. The paper by Coar (2003) has a very helpful discussion on the difficulties of reaching a consensus via asynchronous communication methods such as email.

4. Partitioning the work, so that you are not dependent on working very closely with remote team members on a difficult problem. In the context of software engineering, the design of the software could be partitioned into loosely coupled modules, each module being assigned to one team member or to one location if some team members are collocated. This method of working requires a subsequent integration phase, which can take a substantial amount of time and must be scheduled for. This issue is discussed in more detail in Turnlund (2003) and Hohmann (1997).

Some virtual teams have found that it was beneficial to structure their work to fit the team members' location and collaboration technologies that were available to them. However, virtual teams may find that the current generation of communication and collaboration technologies are neither sufficiently flexible nor of high enough quality to adapt to their requirements. Here, the team has to adapt its working practices to suit the working environment.

How are you going to adapt your own working practices? Or, more to the point, what working practices – team rules and norms – are you going to adopt in order to facilitate productive, collaborative working? Examples of rules that your team could consider are as follows.

- How frequently are you going to ask that team members check their email and team forum? Once a week, twice a week, daily, or at the beginning and end of each working day?
- What communication and collaboration media are the team going to use?
- Should the team set guidelines on when team members might expect to have received a reply to messages posted to a forum or by email?

SUMMARY

In this topic we have explored skills that are useful when working in a team: making decisions, creating trust and rule making. In the former, we have described one approach to making a decision and given four different models for making team decisions. We have also shown how decision making can become a more time- consuming, protracted and challenging process when working virtually. In the latter, we have given a definition of trust, described some of the benefits of working in a team where members trust each other and the drawbacks of working in a team where there is a high level of mistrust. We concluded the section with a brief discussion of the concept of swift trust.

UNIT 2 - SUMMARY

Working at a distance is very different from working physically collocated. You will have to rely on electronic means of communicating with the rest of the team: asynchronously, for example via messages posted to a forum, or synchronously using instant messaging, conference calls or other media. Scheduling your team activities may require patience as you work around your own and other team members' time constraints, and wait for them to complete the activities that the team has assigned to them or post their responses to team discussions in an asynchronous forum. However, as shown by a survey of successful virtual teams (Majchrzak et al., 2004), one of the key factors for success is frequent communication. The communication media that you choose to use do not have to be technically sophisticated – your team just has to use them frequently.

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UNIT 3 - MANAGING TEAM CONFLICT

INTRODUCTION

No matter how trusting and cohesive a team is, there are times when conflict will arise. Conflict can be a healthy thing if properly managed. It can add to the growth and experience of the team. But conflict can also be very destructive and cause un-repairable rifts if not managed. In this unit we will explore methods for managing and responding appropriate to different situations that can lead to or are the result of conflict.

UNIT OBJECTIVES

Upon completion of this unit you should be able to:

1. Identify conflict.
2. Describe the reasons for team conflict.
3. Describe how to react to team conflict.
4. Turn conflict into positive energy.

UNIT READINGS

A list of references and suggested readings are offered at the end of the unit. It is recommended that you read at least two of the referenced chapters/articles.

TOPIC 3.1 - MANAGING CONFLICT – AN OVERVIEW

INTRODUCTION

Before you can manage conflict you must understand what conflict is and why it occurs. This topic will explore the conflict behaviour and the different ways of dealing with these different behaviours arising from conflict.

OBJECTIVES

Upon completion of this topic you should be able to:

1. Define conflict.
2. Describe a model of conflict behaviour.
3. Employ different strategies to manage conflict.

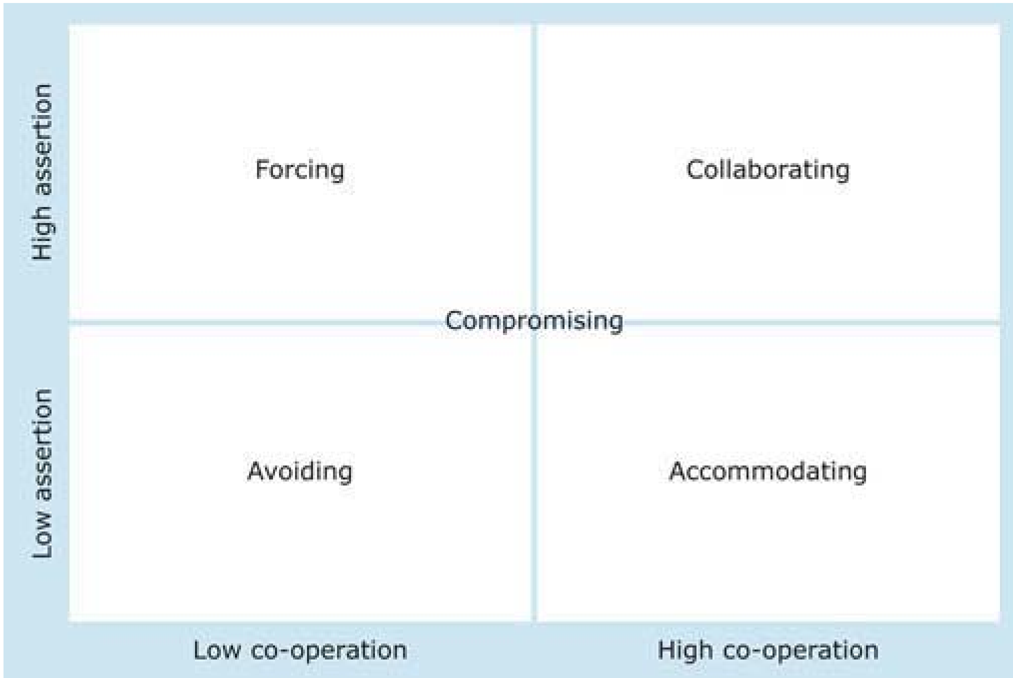
WHAT IS CONFLICT?

Conflict will occur almost inevitably in groups and teams – and between individuals who do not necessarily work together in a group or team. Conflict can arise through:

- Misunderstandings between individuals; these often arise by accident.
- Differences in beliefs and values; these may be personal beliefs or values, or may arise from structural divisions in the organisation, for example, production and marketing.
- Differences of interest and ambition; such differences can result in competition for power, status and resources.
- Interpersonal differences: people have different personalities and temperaments.
- Feeling and emotions: people may have strong feelings and emotions but disguise them in work settings by talking about 'the principle of the matter.' Conflict itself can arouse emotion, leading to further conflict.

Not all conflict is destructive, however. Some conflicts are best discussed openly: managed constructively, such discussions can lead to deeper understanding and better decisions. The problem is that conflict tends to be seen in terms of win–lose – that is, one argument will win and the other will lose. But it is possible to reach an outcome in which elements of both arguments are accepted – a win–win situation. Negotiations over pay are a simple example: employers may agree to pay employees more in exchange for changes in working practices. For win–win outcomes, however, there need to be mechanisms for open discussion and fair decision-making. The likelihood of resolving conflict depends on the behaviour of those involved. To understand this better, it can be helpful to classify people's responses to interpersonal conflict in five categories (Figure 8). These categories reflect the balance between cooperation (attempts to satisfy the other person's concerns) and assertiveness (attempts to satisfy your own concerns).

Figure 8 - A Two- Dimensional Model of Conflict Behaviour



(Source: based on Ruble and Thomas, 1976, and Whetten and Cameron, 1984)

Forcing represents the wish to satisfy one's own needs at the expense of others' needs. It may involve the use of formal authority, physical threats, majority rule, or disregarding the claims of the other person. This form of conflict management usually results in hostility and resentment and is an extreme example of a win–lose strategy. Nevertheless, sometimes it is necessary – in matters of health and safety, for example, or at times of crisis.

In contrast, accommodating satisfies the needs of the other person at the expense of one's own needs, often to maintain friendly relations. It may work when the quality of the relationship is more important than other considerations. However, it can lead to difficulties: discipline is seen to be negligible, decision- making becomes difficult and you lose respect and self-esteem – a win–lose situation.

Avoiding potential conflict is a common response to confrontation, particularly if a manager lacks self- confidence. It is the classic lose–lose situation, creating frustration and tension because issues are never resolved. Its use is normally justified only when an issue is unimportant or when time is limited.

Compromising seeks to obtain partial satisfaction for both parties. It is the preferred strategy of many managers since it avoids some of the adverse consequences of other behaviours. It is particularly useful in complex situations and where there is time for negotiation and discussion.

The only truly win–win strategy is collaborating, seeking to find solutions that are understood and appreciated by all parties. The focus is on the problem, not on personalities, blame or fault. It requires you to be both assertive and cooperative, and works when there is time to establish a collaborative environment.

Ways to Deal With Conflict

Once you have identified a disagreement and understood why it has arisen, you then have to decide what to do about it. You will need to consider a number of factors, including the seriousness of the conflict, the timescale (whether it needs to be resolved quickly or not), the ideal or preferred outcome, and your own power and preferences, strengths and weaknesses. If the conflict is relatively trivial or is a 'healthy' disagreement, you may decide that it is better to let it run its course. However, if there is a danger of the conflict escalating and becoming destructive, you will want to act. You have three choices: to ignore it, to prevent it occurring, or to resolve it.

Non-intervention. This is quite common and can be successful. However, there is always the risk that the conflict will become destructive; failure to intervene may make the situation worse.

Prevention. Your chances of preventing conflict will increase if you create a climate in which people seek win–win solutions. You can contribute to this by:

- establishing common goals: identify higher-level goals on which all people can agree;
- changing the roles or groupings of individuals: this can remove sources of conflict; and
- improving communications by encouraging an atmosphere of debate and questioning.

Resolution. When conflict is not constructive you may have to intervene to find a solution by:

- facilitating: this will usually involve allowing individuals to explain their feelings and encouraging them to put their conflict into perspective;
- imposition: people can sometimes be forced to behave differently through a threat of disciplinary action; however, this may not resolve the cause of the conflict and may cause further problems in the future; and
- negotiation: this involves bringing people together to seek and agree a solution; it is likely to require concessions from both sides, and may benefit from creative approaches to find a solution to the problem.

These different approaches to resolving conflict are illustrated in the example below.

Example - Managing Conflict

Johanna groaned as she read the memo from the HR Director saying that all staff would be required to keep worksheets for activity costing. She had expected this, but she knew it would cause massive opposition from staff. After some thought, she asked Barbara, her secretary, to visit staff members to ask them approximately how much time they expected to spend on each project. Barbara would complete and send the worksheets. This way Johanna would avoid conflict with her staff, while still providing the information needed.

Just as Johanna finished reading the memo, the fire alarm went off. Two hours later, after the fire brigade had left, she was looking at the kettle with its burnt cord – no major damage had been caused, but it had seriously disrupted work. After lunch she wrote a memo to all staff in the building: no personal electrical appliances would be permitted. There were perfectly adequate kitchens on each floor, and the safety risk was too great. She was therefore content to impose a solution.

She then went to talk to Monica and Andrew, both members of the same project team who were complaining angrily about one another. Andrew, recruited for his technical knowledge, had told Johanna earlier in the day that he could not work with Monica because she had too little experience and she seemed unwilling to take his views seriously. Monica had complained about Andrew's disruptive behaviour and lack of technical knowledge. Johanna suggested to her that if she were to be successful in the organisation she needed to develop the ability to work with people like Andrew. He had experience that she lacked, and his skills would be needed to implement the project. Johanna suggested that Monica gave weight to Andrew's views in team meetings, and gave him clear accountability for parts of the project. Later, she told Andrew that his experience was vital to the success of the project, and that he should see part of his role as guiding and developing team members such as Monica. Johanna would talk to Monica and Andrew again in a week. It was important that these two learned how to work with each other, so she would take the time to facilitate this.

SUMMARY

In this topic we explored what constitutes conflict and why conflict occurs. We examined a model of conflict behaviour and some key strategies to address team conflict. Once we have identified the reasons for conflict we must negotiate a process to reduce or eliminate conflict. In the next topic we will experience a negotiating process to address conflict in teams and between individuals.

TOPIC 3.2 – NEGOTIATING PROCESS

INTRODUCTION

Whenever you work on a team, team members may disagree. To move from those conflicts to resolution and successful teamwork, you first need to be able to recognize various styles of conflict behavior and adopt communication strategies to transform conflict into successful negotiation. The four steps in negotiation reduce internal conflicts so that the team can meet its goals. In team disagreements, some members may act more assertively than others, while some may be more cooperative than others. Figure 1's two-dimensional grid shows five styles of conflict behavior that combine cooperation and assertiveness in different degrees. For instance, a competitive style is highly assertive but uncooperative; a collaborative style is both highly cooperative and assertive. Compromise misses the best of both cooperation and assertiveness. In this topic we examine the different negotiating styles and processes.

OBJECTIVE

Upon completion of this topic you should be able to:

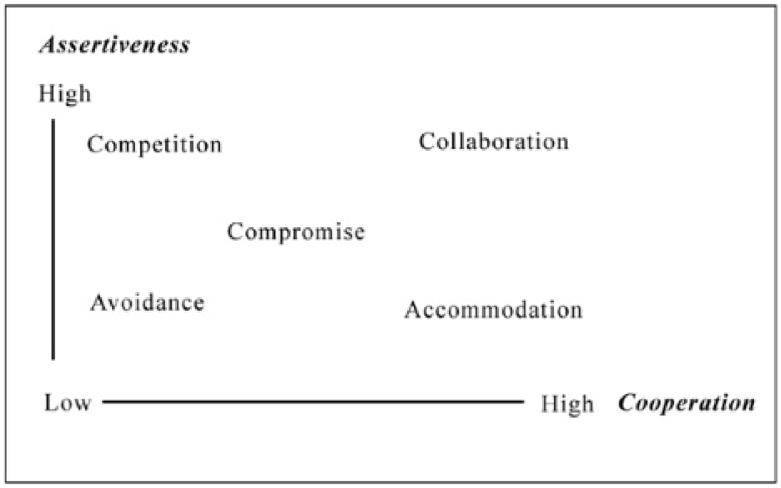
1. Describe the negotiating process.
2. Examine different conflict styles.
3. Employ a communications process to reduce conflict.
4. Employ principled negotiations to reduce conflict.

ATTRIBUTION

Introduction to Negotiating

The grid below demonstrates how varying degrees of cooperation and assertiveness combine in styles of conflict behavior.

Figure 9 – Varying Degrees of Cooperation and Assertiveness



Communications Process to Cope with Diverse Conflict Styles

Once you identify the behavior styles of your fellow team members, you can modify your own conflict resolution style. If your team uses the following communication strategies, you will be able to resolve conflicts and achieve results that benefit most if not all members.

Listening Actively

Listening actively to the other person's point of view can help you judge how assertive and cooperative another person is. Active listening strategies include asking clarification questions, paraphrasing the other person's statements to check the accuracy of your understanding, as well as acknowledging that person's feelings and encouraging him or her to keep expressing them.

By carefully listening to the other person's language, you can judge whether the person seems to lack assertiveness and is avoiding a direct expression of the problem. Draw such people out by asking for elaboration and clarification. On the other hand, if the person's speech is competitive (not cooperative but highly assertive), you can challenge that person to suggest some ways of accomplishing others' goals as well as his or her own. In addition, by using the method described on the next pages, you can uncover the other participants' perspectives and identify their needs and interests.

Noticing Nonverbal Signals

Active listening involves paying attention to verbal cues. However, in face-to-face confrontations, participants express themselves without words as well. If you notice these nonverbal signals while you listen actively, you can increase your understanding of the other person's assertiveness and cooperativeness. The other person's facial expressions, gestures, body posture, voice pitch, speech rate, and voice volume manifest intensity of emotion and feelings. Also, speakers should be aware of their own nonverbal signals. They should avoid defensive (uncooperative) signals and convey openness and supportiveness instead.

Imagining with Empathy

Empathy is the ability to "put oneself in other people's shoes." Imagining how it would feel to be in another person's situation can help participants figure out others' reasons for being uncooperative or withdrawn. Empathy can also help participants imagine solutions to the conflict that might be mutually beneficial.

Choose Words and Manner Carefully

How a person says something is vital. Drawing on active listening, attentiveness to nonverbal signals, and empathy, team members can imagine how others might react to a statement. This awareness will help them craft their language to avoid intensifying the conflict. Members can monitor what they say and strive to express their points without reducing the others' cooperativeness or willingness to continue talking.

Using "I-Messages"

In a conflict, participants become less cooperative when they believe they are being blamed or criticized. Perceived criticism can cause shy persons to avoid further interaction. I-messages are statements that tell how the speaker feels or how the speaker perceives a situation without suggesting others have done so. Compare these messages:

- "Your performance on the request for qualifications presentation was really poor."
- "Everybody thought that you did very poorly on the presentation."
- "I was disappointed by your presentation. I felt that you could have made a stronger point at the end."

The first two comments do not identify who owns these feelings. The first comment accuses the presenter of having done a poor job but it does not identify who owns the feelings. The second statement similarly fails to identify clearly who owns those feelings and instead suggests that "everyone" does. The third comment is a good example of an I-message because it clearly identifies who feels this way ("I was disappointed").

Respecting Others: No Ad-Hominem Arguments

Ad-hominem ("against the person" in Latin) attacks are arguments directed at the integrity of an opponent rather than at the problem. To gain maximum cooperation, everyone needs to focus on mutually beneficial solutions. Stay away from name-calling and focus on the issue at hand instead. Remember that personal attacks create resentment and are difficult to take back.

FOUR STEPS FOR RESOLVING CONFLICT: PRINCIPLED NEGOTIATION

Principled negotiation ideally results in resolutions that all can support. It encourages people to express their needs in an ethical, calm manner.

Step 1 - Differentiate Between the Problem and the People Involved

Fisher and Ury call this step "separating people from the problem." Use empathetic understanding and active listening to understand why the other party has taken a particular position. (A "position" is a claim or recommendation, such as "We should use styrofoam for the struts." Or "We should make the struts out of aluminum."). What are the features or dimensions of the problem that results from competing positions?

Step 2 - Focus on Interests, not Positions

Every position rests on an underlying need or interest. To find the best solution, not one that depends on someone's "caving in" or "getting a part" of what was wanted, participants must identify the interests or needs at the heart of each position. Empathetic understanding may again be necessary in order to understand why another person advocates a certain position. Consider the following statements:

- "We should use PowerPoint for our presentation."
- "We should use a presentation board for our presentation."

Both statements reveal positions without revealing the reason or belief behind them. The first position could stem from the person's desire to showcase his or her technology skills, while the second could stem from a distrust of technology or a concern that the computer in the presentation room might not work. Knowing the underlying reasons allows a team to find solutions capable of meeting all concerns. For example, the team could assign the most experienced PowerPoint users to prepare the first version of the visual aids as well as reserve a backup laptop and projector to take to the presentation. (Another solution might be to print overheads for transparency projection if computer projection fails or is unavailable.)

Step 3 - Invent Options for Mutual Gain

The previous example shows how focusing on interests allows the group to develop creative solutions that reconcile everyone's needs. Once the group has identified the interests underlying each position, it should brainstorm for solutions that exceed the original positions and benefit all sides. Be sure not to criticize solutions while the team is generating possibilities; delay decision-making until later.

Step 4 - Apply Objective Criteria

Choose criteria that everyone agrees are fair and unbiased. In the preceding case, those criteria could be “benefiting from the highest level of skills the team can display” and “overcoming technology limitations.” Once chosen, each option should be ranked according to the criteria. If others will not agree to the highest-ranked option, talk with the instructor for guidance.

SUMMARY

This topic explored the impact of conflict on teams and proposed a four step process for resolving conflict. We explained that an appropriate communications process employing collaborative strategies was instrumental in resolving conflict. Remember, conflict can be positive or negative, but in either case conflict must be effectively managed. The next topic will explore other issues that impact team work.

TOPIC 3.3 – OBSTACLES TO TEAM WORK

INTRODUCTION

This topic is designed to prepare you for this by getting you to reflect on ethical and practical problems that arise in small groups like work teams. Four issues, based on well-known ethical values, are especially important. How do groups achieve justice (in the distribution of work), responsibility (in specifying tasks, assigning blame, and awarding credit), reasonableness (ensuring participation, resolving conflict, and reaching consensus), and honesty (avoiding deception, corruption, and impropriety)?

OBJECTIVE

Upon completion of this topic you should be able to:

1. Define value and explore different value profiles.
2. Respond appropriately to potential obstacles to effective team work.

ATTRIBUTION

In accordance with the Creative Commons licence this topic is attributed to William Free, Ethics of Teamwork available at: http://cnx.org/content/m13760/1.17/

VALUE PROFILES

A *value* "refers to a claim about what is worthwhile, what is good. A value is a single word or phrase that identifies something as being desirable for human beings." Value statements that should be exercised by team members include the following:

1. ***Reasonableness*** - Defusing disagreement and resolving conflicts through integration. Characteristics include seeking relevant information, listening and responding thoughtfully to others, being open to new ideas, giving reasons for views held, and acknowledging mistakes and misunderstandings. (From Michael Pritchard, Reasonable Children)
2. ***Responsibility*** - The ability to develop moral responses appropriate to the moral issues and problems that arise in one's day-to-day experience. Characteristics include avoiding blame shifting, designing overlapping role reponsibilities to fill responsibility "gaps", expanding the scope and depth of general and situation-specific knowledge, and working to expand control and power.
3. ***Respect*** - Recognizing and working not to circumvent the capacity of autonomy in each individual. Characteristics include honoring rights such as privacy, property, free speech, due process, and participatory rights such as informed consent. Disrespect circumvents autonomy by deception, force, or manipulation.
4. ***Justice*** - Giving each his or her due. Justice breaks down into kinds such as distributive (dividing benefits and burdens fairly), retributive (fair and impartial administration of punishments), administrative (fair and impartial administration of

rules), and compensatory (how to fairly recompense those who have been wrongfully harmed by others).

5. ***Trust*** - According to Solomon, trust is the expectation of moral behavior from others.
6. ***Honesty*** - Truthfulness as a mean between too much honesty (bluntness which harms) and dishonesty (deceptiveness, misleading acts, and mendaciousness).
7. ***Integrity*** - A meta-value that refers to the relation between particular values. These values are integrated with one another to form a coherent, cohesive and smoothly functioning whole. This resembles Solomon's account of the virtue of integrity.

Activity 5 – Moral Values of Team Work

Think of team you are currently working with or one that you have had recent experience with. Design a plan for realizing key moral values of team work as it relates to this experience. Your plan should address the following value-based tasks

1. How does your group plan on realizing justice? For example, how will you assign tasks within the group that represent a fair distribution of the work load and, at the same time, recognize differences in individual strengths and weaknesses? How does your group plan on dealing with members who fail to do their fair share?
2. How does your group plan on realizing responsibility? For example, what are the responsibilities that members will take on in the context of collective work? Who will be the leader? Who will play devil's advocate to avoid groupthink? Who will be the spokesperson for the group? How does your group plan to make clear to each individual his or her task or role responsibilities?
3. How does your group plan on implementing the value of reasonableness? How will you guarantee that each individual participates fully in group decisions and activities? How will you deal with the differences, non-agreements, and disagreements that arise within the group? What process will your group use to reach agreement? How will your group insure that every individual has input, that each opinion will be heard and considered, and that each individual will be respected?
4. How does your group plan on implementing the value of (academic) honesty? For example, how will you avoid cheating or plagiarism? How will you detect plagiarism from group members, and how will you respond to it?

Produce a paper and submit to your instructor for review and comments.

OBSTACLES TO EFFECTIVE TEAM WORK

When working in a team you may face some of the obstacles to achieving your team goals and objectives.

The Abilene Paradox

The story involves a family who would all rather have been at home that ends up having a bad dinner in a lousy restaurant in Abilene, Texas. Each believes the others want to go to Abilene and never questions this by giving their own view that doing so is a bad idea. In the Abilene paradox, the group winds up doing something that no individual wants to do because of a breakdown of intra-group communication.

Avoiding the Abilene Paradox

- At the end of the solution generating process, carry out an anonymous survey asking participants if anything was left out they were reluctant to put before group.
- Designate a Devil's Advocate charged with criticizing the group's decision.
- Ask participants to reaffirm group decision--perhaps anonymously.

Group Think

The tendency for very cohesive groups with strong leaders to disregard and defend against information that goes against their plans and beliefs. The team/group collectively and the members individually remain loyal to the party line while happily marching off the cliff, all the while blaming “them” (i.e., outsiders) for the height and situation of the cliff.

Avoiding Group Think

- The leader of a policy-forming group should assign the role of critical evaluator to each member, encouraging the group to give high priority to airing objections and doubts.
- The leaders in an organization's hierarchy, when assigning a policy-planning mission to a group, should be impartial instead of stating preferences and expectations at the outset.
- Throughout the period when the feasibility and effectiveness of policy alternatives are being surveyed, the policy-making group should from time to time divide into two or more subgroups to meet separately....
- One or more outside experts or qualified colleagues within the organization who are not core members of the policy-making group should be invited to each meeting ...and should be encouraged to challenge the views of the core members.
- At every meeting devoted to evaluating policy alternatives, at least one member should be assigned the role of devil's advocate.

Group Polarization

Here, individuals within the group/team choose to frame their differences as disagreements. Framing a difference as non-agreement leaves open the possibility of working toward agreement by integrating the differences or by developing a more comprehensive standpoint that dialectally synthesizes the differences. Framing a difference as disagreement makes it a zero sum game; one's particular side is good, all the others bad, and the only resolution is for the good (one's own position) to win out over the bad (everything else).

Avoiding Group Polarization

- **Set Quotas.** When brainstorming, set a quota and postpone criticism until after quota has been met.
- **Negotiate Interests, not Positions.** Since it is usually easier to integrate basic interests than specific positions, try to frame the problem in terms of interests.
- **Expanding the Pie.** Conflicts that arise from situational constraints can be resolved by pushing back those constraints through negotiation or innovation..
- **Nonspecific Compensation.** One side makes a concession to the other but is compensated for that concession by some other coin.
- **Logrolling.** Each party lowers their aspirations on items that are of less interest to them, thus trading off a concession on a less important item for a concession from the other on a more important item.
- **Cost-Cutting.** One party makes an agreement to reduce its aspirations on a particular thing, and the other party agrees to compensate the party for the specific costs that reduction in aspirations involves.
- **Bridging.** Finding a higher order interest on which both parties agree, and then constructing a solution that serves that agreed-upon interest.

Other obstacles to team work could include:

- **Free Riders:** Free riders are individuals who attempt to "ride for free" on the work of the other members of the group. Some free riders cynically pursue their selfish agenda while others fall into this pitfall because they are unable to meet all their obligations. (See conflict of effort.)
- **Outliers:** These are often mistaken for free riders. Outliers want to become participants but fail to become fully integrated into the group. This could be because they are shy and need encouragement from the other group members. It could also be because the other group members know one another well and have habitual modes of interaction that exclude outsiders. One sign of outliers; they do not participate in group social activities but they still make substantial contributions working by themselves. ("No, I can't come to the meeting--just tell me what I have to do.")

- **Hidden Agendas:** A group member with a "hidden agenda" has something he or she wants to contribute but, for some reason or other, hold back. For example, this individual may have tried to contribute something in the past and was "shot down" by the group leader. The next time he or she will think, "Let them figure it out without me."
- **Conflict of Effort:** Conflict of effort often causes an individual to become a free rider or an outlier. These group members have made too many commitments and come unraveled when they all come due at the same time. Students are often overly optimistic when making out their semester schedules. They tightly couple work and class schedules while integrating home responsibilities. Everything goes well as long as nothing unusual happens. But if a co-worker gets sick and your supervisor asks you to come in during class times to help out, or you get sick, it becomes impossible to keep the problem from "spilling out" into other areas of your schedule and bringing down the whole edifice. Developing a schedule with periods of slack and flexibility can go a long way toward avoiding conflict of effort. Groups can deal with this by being supportive and flexible. (But it is important to draw the line between being supportive and carrying a free rider.)

SUMMARY

There are a number of obstacles that can potentially impact the effective operation of the team. Team leaders must recognize these obstacles and address them quickly. The best way to avoid obstacles is to anticipate them before they cause a problem. Think of the different strategies described in this topic and create your own to help ensure team cohesion and effectiveness.

UNIT 3 – SUMMARY

This unit explored the way teams work and the issues that could impact the effective operation and morale of team members.

UNIT 4 – EVALUATING TEAM PERFORMANCE

INTRODUCTION

This unit is one that is generally applicable to the management of people, not just groups and teams. It will help you to identify sources of conflict and the ways in which conflict can be managed. Note that not all conflict is bad: sometimes it can be constructive, if handled effectively. There are times when it is better to ignore conflict. However, in each case, you will have to use your judgement.

Evaluating team performance is an important element of team working. It can take a number of forms, such as: reporting on progress informally at weekly team meetings, group reviews at key stages along the way, and full and formal external evaluation once the project is completed. Encouraging the team to take responsibility for this evaluation process makes it much more a part of everyday work and less of a management control exercise. Managers and teams need to agree what needs to be reviewed and evaluated, how it is to be done and how it can help the team to be more successful.

UNIT OBJECTIVES

Upon completion of this unit you will be able to:

1. Examine different evaluation and performance assessment methods.
2. Evaluate the effectiveness of your team.
3. Complete a self-assessment of your team.

UNIT READINGS

A list of references and suggested readings are offered at the end of the unit. It is recommended that you read at least two of the referenced chapters/articles.

TOPIC 4.1 – FRAMEWORK FOR TEAM EVALUATION

INTRODUCTION

Here we present a number of approaches for reviewing team progress and processes and for evaluating team effectiveness at the end of a team task or project. We suggest you use whatever seems most suitable for your purposes.

OBJECTIVES

Upon completion of this topic you should be able to:

1. Examine a model of team work.
2. Explain group/team processes.

ADAIR'S MODEL OF TEAM WORK

Adair's model of team work (1983) is useful as a framework for reviewing and evaluating because it highlights the interdependency between the task, the team and the individual in achieving team effectiveness. Questions to consider are:

The Task

- Are there enough resources and internal and external support (external climate)?
- Is the task fully understood? Has it been broken down sufficiently into component parts?

The Team

- Are there the right constituent parts to achieve the current task?
- Has the group formed well?
- Are team members communicating well and reviewing their progress regularly?

The Individual

- Are individuals learning from the experience?
- How are they dealing with their expectations, hopes and fears of this team-work experience?
- Are there issues from previous group-work experiences that need addressing?
- Do they have enough support and development opportunities to perform and develop their roles?
- Are they aware of the consequences of their individual actions in working with or against team processes?

West (2004) proposes that there are two fundamental dimensions of team functioning: the *task* the team is required to carry out and the *social factors* that influence how members experience the team as a social unit. He suggests that for both of these to work effectively teams need to:

- review objectives and find ways of achieving them; and
- reflect on the ways in which the team provides support to members, how conflicts are resolved and what the social climate of the team is like.

West has developed a questionnaire, set out in Box 9, to measure how well these two factors are working. He suggests it is completed individually without consultation. It could then be used as a means of identifying and agreeing problematic areas to work on.

TEAM FUNCTION QUESTIONNAIRE – SELF ASSESSMENT

Rate on a scale of 1 (very inaccurate) to 7 (very accurate) how each criteria describes the situation in your team. Add up the scores for the task dimension and the social dimension separately. If more than one person completes the questionnaire, divide the total *for each dimension* by the number of people who complete the questionnaire to calculate an average for each dimension. Compare the average score for each dimension with the values shown at the end of the questionnaire. The questionnaire can also be used to compare different teams.

	INACCURATE →					**VERY ACCURATE**	
Team Criteria	**1**	**2**	**3**	**4**	**5**	**6**	**7**
Task Dimension							
We review our objectives							
We regularly discuss whether the team is working effectively together							
The methods we use to get the job done are often discussed							
In the team we modify our objectives in light of changing circumstances							
How well we communicate information is often discussed							
We often review our approach to getting the job done							
We often change our team strategies							
We often review the way decisions are made in the team							
Social Dimension							
We support each other when times are difficult							
When things at work are stressful the team is very supportive							

	INACCURATE					VERY ACCURATE	
Team Criteria	1	2	3	4	5	6	7
Conflict doesn't last long in this team							
We often teach each other new skills							
When the pressure is on, we 'pull together' as a team							
Team members are always friendly							
Conflicts are dealt with constructively							
People in the team are quick to resolve arguments							

What is is your score? Where does your team fit on the scale below? How can you improve your score in the future? Record your observations in your course journal

High Functioning Team - 42–56

Average Functioning Team - 34–41

Low Functioning Team - 0–33

(Source: adapted from West, 2004)

OBSERVING GROUP PROCESSES

Another method for reviewing and evaluating team processes is through observation. A method suggested by Boddy (2005) is that one team member observes the team for an hour and keeps a careful record of what members say or do. They also note how other members react and how that affects the performance of the team. Suggestions on what to observe are listed in Box 10.

Reflecting on Group Interaction

Some questions to consider:

8. Who spoke? How?
9. How were the roles allocated?
10. How were decisions reached?
11. What stated or unstated rules were being used?
12. What was the climate (or atmosphere) in the group like? How did you personally feel during the activity?

(Source: adapted from Boddy, 2005)

An observer who may or may not be the team leader or manager could look out for unhelpful personal behaviours. Sometimes it is difficult to see whether a particular action is a maintenance-oriented or a self-oriented behaviour: that is, whether it is intended to maintain harmony in the group or to satisfy personal needs. Some examples of self-oriented behaviours, as described by Kakabadse *et al*. (1988), are given in Table 6.

Table 6 - Self-Oriented Behaviours

Attacking/Defending	Attacking or rejecting others' positions or defensively strengthening one's own position
Blocking/Stating Difficulties	Placing blocks or difficulties in the path of others' proposals or ideas without offering an alternative proposal or giving a reasoned argument
Diverting	Moving the discussion away from areas in which you feel your position is threatened or weak
Seeking Sympathy/ Recognition	Attempting to make others sorry for you, and therefore willing to support you, or actively attempting to gain positive feedback on the value of your contribution to the group process
Withdrawing	Refusing to make a contribution
Point Scoring	Winning petty triumphs over other members to enhance your status
Over Contributing	Monopolising discussion in the group; using the group process to satisfy individual power and control needs
Trivialising/Diluting	Picking on minor faults in others' proposals or contributions in order to undermine their position

(Source: Kakabadse *et al*., 1988)

Identifying and discussing such behaviours (and providing evidence to support your claims) can be constructive. The questions listed below describe how comfortable individuals feel in the team could be incorporated into such a discussion.

Questions Gauging Satisfaction with Team Social Processes

1. Does the team provide adequate levels of social support for its members?
2. Does the team have constructive and healthy approaches to conflict resolution?
3. Does the team have a generally warm and positive social climate?
4. Does the team provide adequate support for skill development, training and the personal development of all its members?

(Source: West, 2004)

Summary

In this topic we explored how to evaluate team and group processes through observation. In evaluating team performance we must look at the team as a whole, individual team members and the team leader.

TOPIC 4.2 - END OF PROJECT EVALUATION

INTRODUCTION

Evaluation of a team can be either looking at the internal processes or the external outcomes. In this topic will examine how to evaluate the impact of the team and whether it achieved its goals and objectives.

OBJECTIVES

Upon completion of this topic you should be able to:

1. Evaluate team effectiveness.

EVALUATION – AN INTRODUCTION

Bateman *et* al. (2002) suggests six areas for the investigation of team effectiveness, which can be evaluated on an ongoing basis, retrospectively at the end of a project or at a specific stage in the group- working process. These are:

1. **Team synergy**. There is a shared sense of purpose and identity.
2. **Performance objectives.** There are clear performance objectives in terms of budgets, activity or throughput levels, which are monitored.
3. **Skills.** Team members are adequately trained and are competent to do their work. They are also flexible.
4. **Use of resources.** All resources including people, buildings and equipment are used effectively and to their full potential.
5. **Innovation**. The team constantly looks for ways to improve products and systems of work.
6. **Quality.** There is a high level of customer awareness; standards are identified and monitored. Statements relating to these six areas of investigation are shown in Table 4.6. They can be used for group review discussions and as a means of identifying problematic areas for further investigation.

Table 7 - Shared Purpose and Identity

Statement	Yes	No
There was a common sense of purpose		
Members were clear about their roles		
There was effective communication		
Individuals felt valued as members of the team		
Individuals felt proud to be a member of the team		
Morale within the team was high		
There was effective and appropriate leadership		
All the individuals performed to the best of their abilities		
There was a willingness to be flexible and perform other roles and jobs		
Members of the team felt that they were fully utilised		

Statement	Yes	No
The team had the resources it needed to do the job		
Team members were encouraged to be innovative Problems were quickly identified		
The team was quick to address the problem once identified		
Problem solving was seen as an opportunity for learning and growth		

(Source: adapted from Bateman *et al*., 2002)

TEAM REWARD

Team evaluation, both internal and external, can be used as evidence that a good job is being done. Rewarding team effort is not always easy, however. Traditional appraisal systems focus on individual performances, so in some appraisal processes there is a danger that insufficient importance is given to contributions to teamwork. Nonetheless team leaders and managers can take time at the end of a task or project to celebrate the success of the team.

THE BENEFITS

Evaluation and review provide a means of identifying and dealing with task and team issues in a timely way. They allow team members to demonstrate progress as well as to voice any concerns. Post-task evaluation is a means of disseminating project achievements to colleagues and stakeholders. It is also a way of focusing on lessons learned which need to be carried forward to future projects and also to identify any training and development necessary. Team evaluation and review need to be approached with care, however. The more the team itself can have ownership of this process, the less threatening it will be and the more it will just seem part of everyday group processes.

Activity 6 - Reviewing/Evaluating Performance

Use one or more of the tools or techniques in described in this topic review or evaluate a group or team you currently manage or participate in to assess its effectiveness. If necessary use a team you recently managed or participated in. The technique of observation is often very useful but cannot be carried out if the group or team is no longer operating. If you want to observe a current group or team, it will take more preparation and time than using the other tools and techniques. Observation needs the consent of all members of the group or team. Thus, you are advised not to choose this technique without consulting your team and your tutor, who will provide specific advice.

Record your observations in your course journal.

All of the techniques are best used in conjunction with team members because the views of group or team members may differ (and be different from your own). People can feel threatened when performance and effectiveness are reviewed. This is more likely if it happens irregularly and if they are not involved in the process. For this reason, you may want to answer the questions based on your own experience and views. Y ou will have to do this if you do not lead or manage a group or team or if it is too difficult to get consent from the manager/leader and members for such a discussion.

Activity 7 - Group or Team Issue

Your task in Activity 7 is to identify a current group or team problem or area for improvement, analyse it and set out your recommendations for addressing it. If the team is one you lead or manage, you may be able to implement your proposed solution immediately, thus improving the effectiveness of the group or team. If you are basing the activity on a group or team you led or participated in during the recent past, then your proposed solution should enable you to consider how you might revise your group and team work and management practices.

Your work on Activity 6 should have helped you to identify a number of potential problems or areas for improvement. Select what you consider to be the most important. This is likely to be something that has the greatest impact on team effectiveness, such as conflict in the group or team.

Use the forms below to guide you through the activity and as a template for your response. If you find that you cannot resolve the problem for some reason, say how it might have been avoided.

Problem Identification and Brief Description

What is the issue or the problem?

Problem Analysis

- What are the 'symptoms' of this problem? What are the different aspects to it?
- How do these relate to team inputs, throughputs and outputs? What information do you have to hand about the issue? What extra information do you need?
- Who do you need to talk to?
- What assumptions do you need to make?

Conclusion Recommendations

- What are the options for addressing the issue or problem? Note here that your choices are likely to depend on the degree of influence you have, but do not restrict yourself too much: you may be in a position to influence others.
- How could these options address the problem or areas for improvement that you identified? Which appeals to you most and why?
- Which would you be reluctant to use and why?
- Who else do you need to work with or influence?

Select one or more options (if more than one solution needs to be put in place) and set it or them out as a set of SMART recommendations. State any assumptions you have had to make. Say how you will monitor, review or evaluate the success of the solution(s).

Strengths, Weaknesses and Implications

- Consider these carefully. When working with groups and teams, implementing solutions can sometimes be complex if all group or team members need to be involved. Implications can mean that a solution is unworkable if it requires, for example, additional resourcing which you are unable to secure.

When you have completed your paper, forward it to your instructor for review and feedback.

COMMENT

Unless the problem you identified was relatively small, internal to the group and did not involve an input problem, such as a mismatch between the group or team and task, then you are likely to have found it more difficult to identify a solution than to identify the problem. Indeed, it may be the case that a solution seemed impossible and you may have resorted to how the problem might have been avoided. Although you will have no solution to implement, you will be able to draw lessons to inform your current and future management practices.

Working at a physical distance from colleagues, managers, partners and clients is becoming a feature of the way we work. More and more members of teams are not physically located in the same workplace. Such teams are often referred to as ‘virtual teams’. The reasons for this change in working practices include:

- organisation-wide initiatives that reach across national boundaries;
- changes to organisational structures due to mergers, acquisitions and/or downsizing;
- entering new markets;
- offering possibilities for homeworking;
- the need to reduce costs; and
- reducing the time taken for a product or service to reach its intended market.

In such situations, co-location of team members in the same workplace may not be possible, and it may not be possible for team members to travel regularly to meet face to face.

SUMMARY

This topic has provided guidance on how to evaluate team outcomes. Evaluation is a key part of any team and team members must be provided with feedback about whether they have achieved their goals and objectives and how they can improve in the future.

UNIT 4 – SUMMARY

Measuring team performance and evaluating team outcomes is not the final step in the team process. Evaluation will close the loop on the team process and provide feedback to team members and senior management on how to improve team work. Evaluation and performance improvement measures must be a key step in all team processes.

FINAL ASSIGNMENT/MAJOR PROJECT

A suggested final course assignment is provided below. The instructor guiding this course may choose to provide another final assignment or a combination of final examination, assignment or major project.

PROPOSED ASSIGNMENT

Objective: Produce a paper describing how you would create and manage a team.

Content: The paper should address the following:

1. Company/organization description.
2. The role of senior management in the creation, management and evaluation of the team.
3. Work environment that team must operate in.
4. Team goals, objectives and tasks.
5. Rules to guide team operations.
6. Team member roles and responsibilities.
7. Team decision making process.
8. Team conflict resolution method.
9. Method for evaluating individual team member performance.
10. Method for evaluating the outcomes of the team process.

Guidance: The paper should be written as an academic paper. References must be provided that support the ideas presented in the paper.

Feedback: Submit your final paper to your instructor for review and feedback.

Grading: Your instructor will produce a grading policy to guide the marking of this paper and other marked activities included in the course.

COURSE SUMMARY

LESSONS LEARNED

This course has prepared its participants to be a effective team members and team leaders. You should have learned how to:

1. Create teams.
2. Assign team roles.
3. Establish team goals and provide direction on how to achieve these goals.
4. How to manage team work.
5. How to manage team conflict.
6. How to evaluate team success.

Good luck in your business and it is hoped this course will help you create effective and cohesive teams that will support the success of your business.

COURSE EVALUATION

Your institution should provide a formal course evaluation form or process that allows you to provide feedback to the institution.

GLOSSARY

Adjourning

The final stage in Tuckman's model of team development. Team members anticipate the project coming to an end and the team being disbanded.

Autocratic

The decision is taken by the team leader or person nominated by the team, see decision-making models.

Baton Passing

Baton passing describes the process whereby project work can be handed from one functional team to another in order to complete the work. This is most common in organisations in which the functional divisions are relatively rigid.

Consensus

The decision is made by agreement of all, see decision-making models.

Contract Team

A contract team is a team that typically is brought in from outside an organisation in order to perform the project work.

Decision-Making Models

The four models are: *Consensus* – by agreement of all. *Majority rule with minority opinion* – the decision is that voted for by the larger number of participants. Those who do not agree can express their disagreement, i.e. their dissenting opinion, and give an alternative view. *Majority rule* – the decision is that voted for by the larger number of participants. *Autocratic* – the decision is taken by the team leader or person nominated by the team.

Dissenting Opinion

Those who disagree with the majority, i.e. who have the minority opinion, can express their disagreement as the dissenting opinion, see decision-making models.

Document Controller

A functional role. The document controller coordinates the production of team documents and reports. In small teams this role could fall to the record keeper or team leader.

Dual Reporting Lines

A person has dual reporting lines if they report to one manager for some aspects of their work and to another manager for other aspects of their work. This can occur in matrix teams.

Forming

The first stage in Tuckman's model of team development. In this stage, team members meet (face-to-face or virtually) and begin to get to know each other.

Functional Team

A functional team is a team in which work is carried out within a functionally organised group, in which people work together to carry out the same or similar functions.

Leadership Role In A Self-Managed Team

The leadership role in a self-managed team is a supporting role, involving identifying the long- term career and personal development needs of the team.

Life Cycle

In the context of teams, a team's life cycle describes the way in which teams form and develop.

Majority Rules

The decision is that voted for by the larger number of participants, see decision-making models.

Majority Rules With Minority Opinion

The decision is that voted for by the larger number of participants. Those who do not agree can express their disagreement, i.e. their dissenting opinion, and give an alternative view, see decision-making models.

Matrix Team

In a matrix team, individual staff report to different managers for different aspects of their work – to the project manager for their work on the project and their line manager for other aspects of their work.

Norming

The third stage in Tuckman's model of team development. The team has established itself and team members are beginning to work productively together.

Performing

The fourth stage in Tuckman's model of team development. The team are working productively together, getting on with the task, producing results, with good working relationships between members of the team.

Progress Chaser

A functional role. The progress chaser is a team member who is responsible for monitoring progress and ensuring that the team is keeping to schedule.

Record Keeper

A functional role. The record keeper is someone who takes notes in meetings, keeps a record of what decisions have been taken, who is doing what, and the date of the next meeting.

Role Allocation

The process of allocating roles to individuals within the team.

Self-Managed Team

A self-managed team is a team in which members of the team take collective responsibility for ensuring that the team operates effectively and meets its targets.

Storming

The second stage in Tuckman's model of team development. This stage in team formation can be characterised by spirited discussions and arguments among the team members.

Swift Trust

In some virtual teams there is no time to build trusting relationships. The team must start work immediately without taking time to build relationships between team members.

Team Development

The fourth phase in the life cycle for virtual team management developed by Hertel et al. (2005). This phase takes place during the definition and execution phases of the project life cycle.

Team Leader

A functional role. The person who leads the team. Even in democratic teams where decisions are taken by the whole team, someone has to take responsibility for chairing meetings. This normally falls to the team leader.

Team Rules

An agreed set of conventions for the ways in which team members work and interact with each other and for conducting the business of the team.

Timed Agenda

A timed agenda allots time to each item on the agenda in order to ensure that later items on the agenda are allocated adequate time for discussion.

Timekeeper

A functional role. In a synchronous meeting, a timekeeper will help to keep meetings running to time, particularly if the meeting is following a timed agenda.

Trust

If you trust someone, then you show a willingness to increase your vulnerability to another person whose behaviour you cannot control, in a situation in which your potential benefit is much less than your potential loss if the other person abuses your vulnerability (definition based on Gignac, 2005).

Tuckman's Model

Tuckman's model of team formation. A model of team formation and development that has five stages: forming, storming, norming, performing and adjourning.