Collaboration Nation: How to Organize and Manage Successful Teams

By

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"None of us is as smart as all of us." – Ken Blanchard

Teams and Organizational Problem Solving

Very few of us work completely on our own. The larger the organization, the more likely it is for you to be pulled into one or more teams to work on different issues. In small organizations, staff may look to outside experts and vendors to help with an issue, adding them to a team. Even solo entrepreneurs will find that, from time to time, they need to work with a group to solve an organizational problem. These teams may come together on a short-term basis to focus on a well-defined problem, or they may be a standing group that meets regularly on issues relevant to the success of the organization.

Many aspects of managing projects or organizational problem solving involve the work of small teams. For example, your organization may be redesigning its website, purchasing a new accounting software package, experiencing a high turnover rate, or considering a new compensation policy. All of these situations can benefit from a team approach to a solution. How do you recruit the right people for the team and lead them to a successful and satisfying resolution of their charter?

Side Note: Experienced managers may think, "I know all this so I don't need to read this article." This may be true, but our article can serve as a refresher and help you to improve your team leadership skills.

Will I Lead a Team?

You may be thinking, “I am just starting my career and I won’t be asked to lead a team.” You may not be asked to lead a team immediately, but you may be asked to participate on a team and this article will prepare you. Employees who know how to get results working with teams can advance their careers through promotion, as they get to know those above them in the org chart.

The Need for Multiple Perspectives

You may wonder, “Why not just have the top executives work on these issues?” Sure, an organization could do that, but such an approach would be myopic and perceived as autocratic. The operative word is “organization,” and since these issues involve the entire organization, an organizational perspective in team problem solving is critical.

Taking a participative approach to problem solving is usually more effective than a top-down approach. The people closest to where the relevant work is being performed usually have excellent ideas about how to fix things, but often feel that they lack the power to effect change. Serving on a team alongside a top executive will show them that their opinions are valued and that will most likely boost their morale. Executives are well served when they listen to staff at all levels of the organization. If you’ve ever seen the television program “Undercover Boss,” you’ll understand how valuable it is for top executives to get to know their front-line employees. In most cases, they come face- to-face with problems that they would not have known about otherwise.

Decisions that are made on a participative basis are usually much more enduring than those that are made unilaterally by the top executives. Considering that many people have a natural aversion to change, having champions at all levels of the organization who can talk about how they were part of the decision-making process to their peers will help facilitate the implementation of the changes.

Another benefit of having different layers of the organization represented on a team is that the top executives will be able to identify future leaders that they can put on a mentorship track. This kind of attention will help with employee retention and create empowered, loyal employees.

Ideal Size of a Team

What’s the right size for a team? It should be large enough to get the job done but not so large that it is unruly and the team members are unable to reach a consensus. In general, we have found that teams of between five and nine are usually adequate to handle most assignments. By striving for this number of team members, usually you can recruit the requisite members who are best suited to join your team.

Selecting Team Members

Select team members at various levels of the organization from top to bottom. Select team members closest to where the problem exists and where the work is being done.

What about team members from the C-suite? Sure, if it is a marketing issue invite the top marketing executive, if it is a morale or turnover issue invite the human resources director, and so forth. If this team is forming to work on a technical issue, invite a colleague with technical competence. In addition, you want someone on the team who is high enough in the organization to have a broad perspective, so that person knows how the ideas being discussed will affect the rest of the organization and can steer the team clear of any potential problems. If this person is not the president or CEO of your organization, it should be someone who has the trust of the president/CEO and can champion the decisions of the group to the top leadership.

Invite those who know your customers (or members) best. For example, say your organization has a customer satisfaction problem, such as high returns or low membership retention rates. If this is your organization’s situation, invite an experienced customer service representative and perhaps the customer service manager. Our observation is that people are usually happy when they are asked to contribute their opinion and they feel like management is listening to them.

Some teams benefit from the inclusion of a contrarian. This person will likely challenge the team to look at the problem from different perspectives. At best, a contrarian will help your team break out of traditional thinking and find innovative new solutions. At worst, they can take up a lot of time during meetings and may derail productive conversations. If you have a contrarian on your team, be sure to have a “parking lot” to record their ideas if they get too far off topic so you can redirect the conversation to the primary issue(s) that this team needs to resolve.

Preparing for the First Meeting

You now have your team assembled. How do you prepare for its first meeting? First, specify the mission, or charter, of the group. We have found that, especially with new initiatives, having an agreed-upon mission statement can help the team stay focused. You may have some overly enthusiastic team members (perhaps the contrarian) who will push for expanding the scope of the team’s work. A well-defined mission statement will be your safety net when reining in those members.

We recommend drafting a mission statement prior to your kick-off meeting, and include a discussion of the mission statement on the agenda. Make sure that you build consensus during this first meeting and everyone agrees to the mission statement. If the purpose of this group is to explore ways to improve staff morale, reduce turnover, or redesign the website, then state it. You don’t want to define solutions at this point, because as the team explores the problem, they need latitude to follow their investigations to possible solutions.

In addition to finalizing the draft mission statement, you’ll want to solicit agenda items for the kick-off meeting from your team members. Give a short deadline for submitting topics, such as within 24 hours of your request. Review your agenda for completeness and clarity. Then have someone else proof the agenda for errors and typos. Distributing a typo-filled agenda will decrease your credibility as the team leader.

Distribute the agenda 24 hours before you are scheduled to meet. If background materials are required for this meeting, send them with the agenda. If the team needs to do a significant amount of reading prior to the first meeting, send the agenda and the materials a week in advance to give everyone time to prepare. If your meeting has 90+ pages of prep that was sent out with less than 48 hours to review, chances are that you will have a very unprepared team at your first meeting, which will waste everyone's time and possibly contribute to low morale.

There is no one optimal time or frequency for meetings; for some issues, one hour might be adequate, for others, all day might be necessary. As you become more experienced leading teams, you'll get a better sense for how often your team needs to meet and how much time they need for each meeting. However, it's important to maintain momentum. So, particularly for a major problem, we suggest that you meet every week. For less urgent issues, for example developing a strategic plan, your team could meet once a month.

Tips: when leading an all-day meeting, plan at least one or more breaks for the morning and likewise in the afternoon. If you see heads and eyelids dropping, call for a one-minute stand-up and stretch break. Finally, if participants are getting overly contentious and angry, call a five-minute cooling off break. If possible, provide water, coffee/tea, soft drinks and snacks.

Running the Meeting: Twelve Tips

A standard template for running a meeting doesn't exist. Rather, we will share what we have learned about running a meeting as team leaders and what we have learned as team members. Before you get into the agenda, ask two questions: "Has everyone reviewed the agenda?" and "Are there any topics you want to add to our agenda?"

- Encourage team members to openly listen to each other
- Request that team members not check phones/tablets during the meeting
- Set time limits on each topic
- Maintain a respectful tone toward each member
- Ask questions to clarify points being made
- Keep the meeting on topic
- Solicit input from all members, including the quiet ones
- Keep the emotional pitch on an even keel
- Summarize key points and work toward consensus
- Consider all suggestions and don't allow members to quash suggestions
- Call breaks at appropriate times
- End each meeting by summarizing key points and stating the consensus

Wrapping Up the Meeting

Your job as team leader is to bring the meeting to a conclusion. Before you do that, ask your members, "Do you have any more comments?" Summarize the key points. Bring the group to a consensus. If there are agreed-up actions by team members, summarize them. Distribute the minutes as soon as you have proofed and reviewed them.

A Word on Note Taking

Accurate and succinct notes are vital for each meeting. Who should take notes? The note taker should not be the team leader, as the team leader needs all their concentration to facilitate the meeting. The team leader should either ask for a volunteer or appoint a note taker. Alternatively, you can arrange to have someone who is not a team member take notes.

Review the notes for accuracy and edit for clarity. Be sure the action items are clearly listed, along with who is responsible for each one. Once you have reviewed and approved, and proofed, the notes, distribute them to the team members.

Considerations for Remote Teams

The COVID-19 pandemic has caused us to learn to work differently. Rather than the face-to-face meetings we're all accustomed to attending, we're now using technology to facilitate video meetings. Most of the advice included in this article applies to remote meetings as well as in-person meetings. Here are some bonus tips for running successful virtual meetings:

- Continue to send the agenda and meeting prep materials prior to the meeting
- The day before the meeting, send a reminder with the log-in information
- Encourage anyone who is not comfortable with the technology you are using to log in early so you can give them a quick tutorial
- Consider sending an electronic gift card for a cup of coffee ahead of time, so your team members can all enjoy the hot beverage of their choice during the meeting
- Encourage everyone to use their video cameras, so you can see how people are reacting to the discussion
- Ask everyone to mute themselves unless they are talking, which reduces background noise
- Especially for new teams, start off your meeting with an icebreaker so everyone can get to know the other team members and become more comfortable with them
- If some team members are quiet, ask them direct questions (that you're sure they would be comfortable answering) to get them to participate

Conclusion

Most modern organizations require groups of people to collaborate on solutions. These groups could form on an ad hoc basis and focus on a specific issue, or they could be a standing group that addresses ongoing issues of importance. When forming these groups, you will find that you get your best results when your team represents a diversity of experience and includes people from various levels of the organization. When you properly prepare for your meetings, run them well (that is, productively), and follow up in a timely manner, your team members will feel that they are participating in something worthwhile and perhaps even exciting. Being a good team leader can instill that excitement into your team members and result in a successful team.

Also of Interest: Career Management and Networking Articles

Tips for Career Success: We invite you to check out the FREE career management and networking articles coauthored by Liz Novak and Jack McHugh. P.S. These articles have valuable advice for seasoned professionals as well. http://www.johnbmchugh.com/career_management.htm

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