

Team Alignment: Taking Teams to the Next Level



TALENT DEVELOPMENT

HCI White Paper

By DBM & HCI

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Introduction

A slow but steady economic recovery is contributing to increased confidence. This confidence has led to a renewed focus on growth. Many organizations need to consider how they can ramp up performance to meet aggressive business objectives. With fewer resources and the need to accelerate performance, highly skilled and effective teams play a large role in achieving aggressive business goals. The smartest companies will make it a priority to invest in talent development initiatives that focus on effective teaming linked to the organization's strategy.

Do your workgroups have the competencies needed to perform effectively and meet business objectives? How are you developing teams for innovative, collaborative, high quality performance?

With talent development a top priority, companies want to ensure their people are capable of working together, cross-functionally and cross-culturally. However, organizations remain cautious in their spending, seeking to ensure they are investing in the right programs for the right people. But neglect development and you risk failure. How do you ensure talent development programs create value?

In this paper, Peyton Daniel, Senior Managing Director of Talent Development and Coaching Practice Leader at DBM, along with Josephine Washington, a DBM executive coach, and Libby McCready, a former executive coach and now the Director, Strategic Learning at Dundee Wealth, will discuss a cost-effective emerging model of talent development that is designed to accelerate development of teams and drive real business results.

Current Realities

In today's business environment, achieving financial objectives has never been tougher — often with fewer resources, increasingly complex challenges, stiffer competition and reduced budgets. Yet the stakes, expectations and pressures to perform well have never been higher. Business goals must be met; it's not an option.

What are some of the consequences of this tough environment? Daniel observed that, "We're continuing to see much flatter organizations as a result of restructurings. Therefore, we're seeing more people working in teams. When you add to this the fact that so many people are stepping into new roles, changing job functions, taking on more responsibility and facing shifting business priorities, organizations are reporting that workgroups make slower progress toward financial goals when, in fact, they need to deliver results faster than ever before. Consequently, there's a lot riding on teams. As a result, we're seeing that the most valued skill today is, increasingly, the ability of workgroups to hit their financial objectives more quickly."

McCready added, "The current reality reinforces the importance of 'leaders leading learners'. More than ever, with reduced training budgets, leaders are becoming accountable for reinforcing the right behaviors. We've been talking for years about ensuring that top talent doesn't walk out the door – taking all of their knowledge with them. One of the ways to transfer knowledge is through workgroups – the ability to grow capabilities in real time on real issues. If we do workgroups right, they can become a phenomenal succession planning strategy." According to Washington, "Many times what gets in the way of our leaders being able to guide workgroups is that they don't know how to facilitate learning."

Matrixed organizations have given rise to people being asked to do more, which requires increased collaboration to get work done. One of the biggest challenges in creating effective collaboration is developing the ability to influence without authority. More than ever, people must get work done through influencing. This requires not only collaborating, but co-creating. Working together to get things done, synchronizing to create results. The theme might be stated as, "Collaborate to co-create, not just collaborate."

The Implications for HR

It falls to HR to make sure workgroups hit their targets more quickly. Yet, HR doesn't always have the ability to invest in traditional forms of leadership development, like executive coaching, formal classroom training or e-learning. These methods either take too long or exceed the budget. So there is a pressing demand for new ways to balance the need for speed and efficiency with the heightened demand for results.

With this in mind, McCready asserts, "The frustration we often hear from HR is, 'We've tried this team stuff before, but it didn't have the impact we had hoped for.' But in many cases, it wasn't connected to the business strategy – it was a separate piece about style,

issues, or preferences, rather than how the team can create the right dialogue to move the business forward. These efforts can't be separate from the business conversation."

Washington agreed. "So often we address teams separately from the business. But I'm also hearing some HR leaders confirm that in many cases, something was accomplished, they just want to take it further. Build on the capacity they may have cultivated, and now connect it to the business — increase ROI by creating a team of learners."

The Consequences of Doing Nothing

HR might think it has to stand by on the leadership issue because of smaller budgets. Yet there are consequences of doing nothing. The CEO's financial mandates are put at risk as workgroups are left to either sink or swim. "Your ability to retain your top talent is diminished as frustration builds due to confusion regarding expectations, underperformance and obstacles to achieving goals," said Daniel. "If that happens, HR's credibility as a strategic business partner will be compromised. Just as hitting financial targets is not an option, doing nothing to support workgroup success is also not an option."

"At DBM," Daniel continued, "we have introduced a solution that's all about increasing the business case for success. I know that team development activities aren't a new concept; however, taking it to the next level of power, speed, effectiveness, and ROI is new." DBM's solution is called "Team Alignment" and it's about multiplying the impact a team can make. Fundamentally, the solution captures the inherent efficiency of the one-to-many approach vs. the one-to-one approach characterized by executive coaching. It gets teams aligned and to the next level, by:

- Jumpstarting the clarification of expectations and commitments
- Driving ownership
- Removing obstacles that impede progress

By focusing on effectiveness and increasing speed, HR can create a higher ROI than is achieved with traditional solutions.

The Essentials of Team Alignment

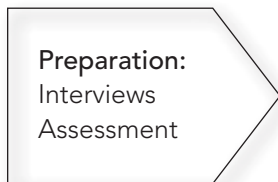
You can start with an existing high-performing team that is mission critical to the business. Are there new members, new strategies or new goals that impact team dynamics? This can create challenges that impede performance. How do you re-align the team and get performance back on track? In order to be efficient in the alignment process, the solution must be compact, fast, and simple. The solution involves:

- The leader and team members
- An external Coach/Facilitator who brings an appropriate level of business experience, coaching and facilitation skills, as well as third party objectivity.

There are two phases to the Team Alignment process:

- Phase I: **Contracting** between a team leader and each member of the team to ensure the foundation is in place for results
- Phase II: **Accelerating action** around the contract because alignment without speed is still ineffective

Phase I: Contracting



Phase II: Acceleration



Phase I — Contracting

Individual prep-work with coach

The process starts with individual prep-work with an experienced coach. Each team member, including the manager, prepares a personal short list of commitments for results and individual expectations of support. The coach also takes this opportunity to interview each workgroup member about their perceptions of the challenges and opportunities the team faces. The coach then challenges the perspective on the issues, posing questions to help pare them down to the core issues.

Facilitated work session

The facilitated work session is an intense two-part, two-way conversation with a coach to make sure there is alignment between the team leader and the team members. The leader starts the process by presenting his/her commitments for results. That's followed by a team member who shares expectations. Then, with the help of the coach, there is a conversation that highlights common ground and any areas that are out of alignment. Constructive dialogue is used to reach agreement. The reverse process then follows, with the team member presenting his/her commitments for results and the team leader sharing his/her expectations of the team member. Part of the coaching role is to make sure that the agreements, concerns or additional agenda items are recorded. That can be done with something as simple as a flipchart in the room.

There is another option to this method. Daniel explains, "You can have these facilitated sessions take place in triads with the team leader, team member and coach, or you can do this as a full team. If you choose triads, it takes about 30 minutes per triad. For one group session, you should expect no more than half a day." Following each session, the coach prepares a written, bulleted "summary contract" and sends it to all parties.

To determine which method will work best, Washington suggested, “It really depends on the readiness of the members in terms of whether to bring people together as a team or in triads. To what extent have they actually demonstrated competency in communicating effectively and taking part in coaching? If there is a foundation of these skills, bringing people together as a team can be the better choice.” McCready observed that, “I often decide based on my initial analysis of the strengths of the leader, relationships among team members, etc. gained from the one-on-one prep work. It could be fine to have the whole team come together, but I may detect challenges within the one-on-one relationships or expectations that are significantly out of sync, in which cast the triad would be a better approach. At a very basic level, the size of the team can impact the decision as well. This phase of the team alignment process needs all voices to be heard, and that’s sometimes easier in a smaller group setting.”

Summary Contracts

The results of Phase I are summary contracts that ensure clarity and alignment around commitments and expectations. The contracts articulate what each person is committing to as well as expecting in terms of achieving the business results.

Phase II — Accelerating Results

Assessment

The coach briefs the team leader on the interview summary data captured during the first part of Phase I, ensuring the leader is aware of the collective challenges and opportunities. At the same time, a self-assessment is administered that provides each member with some data about their team communication style. “This is situational,” said Daniel. “You may have an assessment tool that you prefer or, based on what the coach learns, the coach can recommend an assessment tool from our portfolio.”

Team facilitation

The contracts from Phase I are the backdrop. They provide a clear understanding of commitments and expectations to achieve business results. The interview summary data is reviewed and discussed, including the opportunities and challenges, and what this means to the team’s performance. “We then explore the aggregate self-assessment data to understand current capabilities and potential obstacles that could slow things down,” said Daniel. In that context, the coach facilitates the development of an action plan to accelerate the achievement of business results. This plan is now owned by everyone on the team.

A manufacturing firm

Related by DBM Executive Coach, Josephine Washington

A new team leader requested support on how to synergize team capabilities and eliminate communication conflicts. The team leader had a coaching leadership style, yet the workgroup commitments were unknown, and a customer-critical core process was at risk. We initiated the Team Alignment solution. Within six months, the key performance indicators reported a 10% increase in production, 33% staff reduction, 74% safety improvement, and an 82% change of noticeable positive leadership behaviors. The aligned team had increased their business focus, competency, passion and strategy. The team was now capable of sustaining a positive ROI.

When Is Team Alignment the Right Solution?

“What we have learned,” Daniel reported, “is that there is a combination of indicators and qualifiers that help us identify when Team Alignment is the right solution for a team.” Indicators include:

- Having mission critical teams
- Changing team membership
- Teams performing below expectations
- A newly formed team

Mission critical teams are probably the most important group to benefit from the Team Alignment process. What is a mission critical team? According to McCready, a mission critical team might be a group brought together for product development or R&D, or several groups brought together around a change process, or a merger/acquisition team, or a team charged with a new compensation plan for sales, or even the executive management team. “It’s not to say that other teams don’t have an important — even critical — mandate; but we tend to categorize the examples above as mission critical.”

How does one know when a team is ready for the Team Alignment process? Washington replied, “They have a coaching style leader, they already collaborate to some extent, they share resources, they are low on ‘noise’. You may have already done some readiness work to prepare them for the Team Alignment process.” McCready agreed, and added a caveat. “This is not a solution for a fundamentally dysfunctional team. This will not work for them. There is a big difference between a team that is not producing because of challenges or even some conflict and a truly dysfunctional team. For a team in real trouble, you need to do other things first to turn things around, that is, get rid of the disruptive person, replace the leader, etc.”

The sales organization of a financial services firm

Related by DBM Executive Coach, Libby McCreedy.

“Much had been done over the years with skills-based training, but implementation of skills was inconsistent. More traditional classroom training wasn’t going to be the solution. Plus, training budgets were severely restricted. And, there was a pressing need to introduce a series of new and complex products and get them marketed and sold quickly!

With Team Alignment, we took a new approach. We brought sales people together with product specialists, marketers and learning experts to create an action team. Their mandate as a team was to create best practice strategies for meeting sales targets of new products. Included in the mandate was a requirement that the strategies must reinforce existing selling techniques that had previously been taught in classroom sessions. Team members would be responsible for the pilot sales efforts and through a six-week effort would a) have achieved some sales success, and b) would document the best practice processes and skills it took to win business. Finally, this team would become the ‘trainers’ of their best practice strategies and would be the point-people for others who might struggle in the roll-out.

This test team project was so successful that the organization now uses this method consistently for teaching and reinforcing selling skills and taking new products to market. Team Alignment reduced the need for expensive training, shortened time to market on new product launches and in some cases appeared to have shortened the sales cycle. Today, the sales organization might have up to as many as five such teams going at any one time around any real and current challenge worthy of examining to create innovative solutions. What that means is that there is now teaming where only individual contributor mindsets existed before and that leaders are developing — not only the ones with titles, but people at various levels.”

Critical Success Factors

It is vitally important to have an experienced and competent coach/facilitator at the helm when a Team Alignment solution is applied. A successful outcome depends on a highly skilled coach. Characteristics of a great coach include:

- Demonstrated business experience
- Demonstrated coaching experience
- Highly expert group facilitation skills
- Third party objectivity, which promotes greater openness, creates a sense of empowerment and helps to uncover issues more quickly

Making the Case

If HR wants to be a strategic partner, it needs to articulate the business value of the Team Alignment solution internally. HR needs to have a “victory speech.” Buy-in starts by outlining where the solution fits. For example, is there a compelling business need to accelerate the performance of a workgroup right now? Secondly, make it clear that the process is proven, that it has been used successfully in many organizations, and that it’s not a headache to implement. Emphasize that it is strategic, business-focused and not a team-building exercise. “Be sure to emphasize the business context,” said Washington, “including the sustaining power and ROI of Team Alignment for getting the team to the goal faster.” McCready agreed and added, “For those HR executives who are struggling to be a strategic business partner, this solution speaks the language of business. It’s all about driving results.”

Conclusion

The dynamics of business today, the need for speed, results, and the inherent risks involved, put the focus squarely on the ability of teams to get a job done effectively and efficiently. Organizations cannot afford to leave the success of teams to chance. Success involves building on the foundation of talent development already in place at a company, then taking it to the next level by implementing a business-focused solution that aligns expectations and commitments. In turn, this accelerates the ability to achieve results. The Team Alignment process has proven effective in achieving better team leadership, team performance, organizational performance and ROI — for a relatively small commitment in time and resources.

Contributors

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Peyton is responsible for leading DBM's Coaching Coaching practice in North America, partnering with organizations to identify key business challenges and explore ways that DBM can support senior executives in achieving superior business performance. Peyton holds a bachelor's degree in Communications from Stanford University.

Libby McCready

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Libby began her career as a marketing and communications executive before becoming a learning strategist, change agent and executive coach. For the past ten years, her consulting and coaching has been centered on one vital concept: conversations that drive measurable results. Libby brings a Masters of Arts degree in Organizational Learning and Leadership.

Josephine Washington

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Jo has over 30 years of global experience in HR and organizational development. She is a specialist in leadership and team coaching, as well as process engineering and strategic planning. She is a former senior executive in the financial services industry and brings numerous certifications and a Masters degree in Counseling.



About DBM

DBM (www.dbm.com) is a leading global outplacement and talent development firm. For over 40 years, DBM has been helping organizations and individuals deal with the events and challenges of transition. With unparalleled industry experience and leadership, DBM provides career transition and talent development solutions to the individual and the organization — ensuring successful transitions and tangible improvements to business performance. DBM has 200 locations around the globe serving 85 countries and has partnered with 70 percent of the Fortune 500 and 80 percent of the Global 500 companies.



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