

Senior Team Alignment Process™

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Senior Team Alignment Process™

Balancing Individual Accountability with Team Accountability

Most business leaders understand that there are significant challenges to getting the *Senior Leadership Team* to function as a team, despite the obvious benefits to the organization of a shared commitment to the *purpose, values* and *vision* at the top.

Jon Katzenbach, a former Director of McKinsey and Company, says in his book *Teams at the Top*:

“...we all know that these so-called top teams seldom function as real teams because of the pressures of other priorities, as well as their strong desire to preserve individual accountability, if not ego.”

Most members of the Senior Team are accountable for a department, function or business unit within the organization... so individual accountability is extremely important. So how do they balance that with the benefits to the organization of all members of the Senior Team *being on the same bus*?

Being a Member of the Senior Team is a Part-Time Role

The first basic thing to understand is that most teams are not full time teams. In fact, it is very much a part-time role. Senior Team members are selected for their knowledge and expertise and their primary role is to fulfill their functional responsibilities.

For example, the CFO is a member of the Senior Team, but his or her primary responsibility is for the financial functioning of the organization. As a member of the Senior Leadership Team the CFO's focus needs to be on the organization as a whole, not just the finance department. So to be an effective team member the CFO needs to understand the difference between these two roles, and the need to adapt as they move from one role to the other. These two roles have very different responsibilities and require different behaviors.

There are two important ingredients that need to be present for a *team at the top* to find the balance between *individual accountability* and a *team focus* on the organization as a whole:

1. Behavioral Adaptability is an Essential Skill

Effective teamwork cannot be achieved unless team members understand the need to switch from one role to the other. To do this, team members first need to have the *flexibility*, the *willingness* to mentally switch roles, and secondly the behavioral *adaptability* to effectively perform both roles.

Behavioral adaptability requires a high degree of *emotional intelligence*. The emotional competencies of *Self-Awareness* and *Self-Management* are essential to increase awareness of the need to excel in two roles requiring different behaviors, and then to put out the effort to adapt to behaviors that may be quite uncomfortable.

When a person attempts to use behaviors that are not comfortable for them, they are likely to experience some degree of discomfort and anxiety. The natural instinct in this situation is to revert back to the habitual, more comfortable behavior. Learning to change old habits takes time and a single *training event* will have virtually no impact on increasing behavioral adaptability.

2. The Motivation to be a Team

The second *basic* fundamental is that teams must have a significant reason for existing.

Katzenbach's research identified the most important ingredient for team success is a *clear and compelling performance challenge*. Many teams fail to establish a *team performance challenge* that is *meaningful and important* to all team members. Without it there is no motivation for team members to put out the effort to adapt their behavior.

Every organization has many challenges to deal with. The discipline required for a Senior Team to be effective is to determine what their *team performance challenge* is at this point in time and to be committed to putting out the effort to adapt their behavior so the team can work together to achieve the desired results. This requires a high level of *trust* and *open communication*.

Measurement is Critical

Integro has been measuring the level of trust and alignment in senior teams for 25 years with our **Team Alignment Questionnaire™ (TAQ)** and our research shows us that there are few teams at the top that have a high level of trust and a high level of alignment with the organization's *Purpose, Values, Vision* and *Goals*.

The TAQ measures the team in two aspects of *alignment* prior to commencing any team discussions. The first is *Clarity*... the degree to which team members are *clear* on their *Purpose, Values, Vision* and *Goals*, and secondly whether individual team members *Approve* of where the team is going and how they are going to get there.

High levels of *Team Clarity* and *Personal Approval* are essential to getting the team commitment to achieving the organization's *Vision* and *Goals*.

The second area the **Team Alignment Questionnaire™** measures is the *trust level* within the team. When the trust level is low team members are reluctant to speak up when they don't agree, cliques develop and essentially we end up with people on a number of different buses.

Integro's unique trust model: the *Elements of Trust™* helps teams increase the trust level so that the real barriers to high levels of *Clarity* and *Approval* can be identified and removed. Knowing that we will be measuring the *Elements of Trust™* and *Clarity* and *Approval* again keeps the team focused on their *team's performance* rather than on the personalities of team members, togetherness or team building for its own sake.

“... although the (executive) group may proudly wear the team label, it does not function as a real team, nor does it achieve its potential performance as a leadership group.

Jon Katzenbach
Teams at the Top

Program Design

The rationale behind the design is as follows:

Module 1 – Getting “On the Bus”

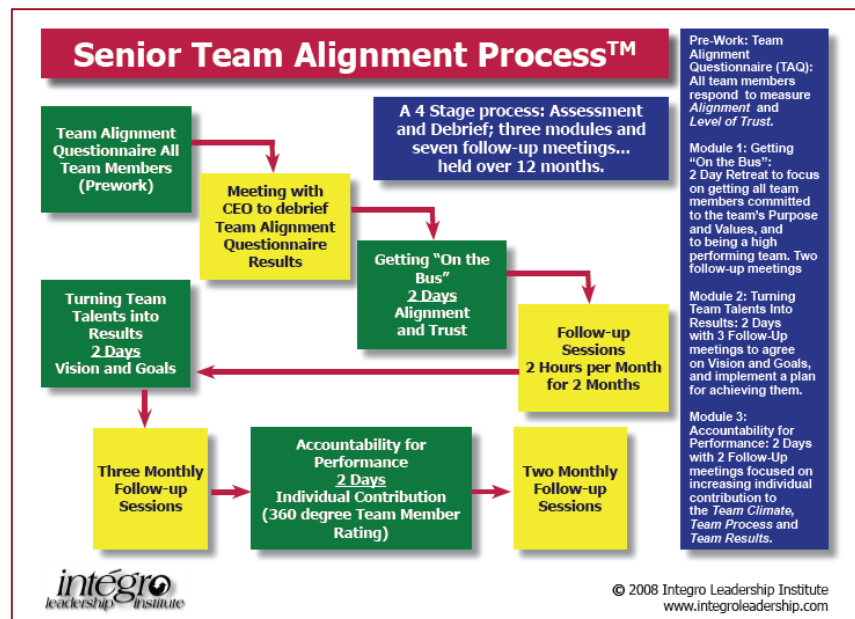
The first stage in moving a Senior Executive team towards “high performance” is for the team to become a “real team... a team that is in alignment about why they exist – and committed to achieving the organization’s *Vision*. We use the “on the bus” analogy to ensure that each team member understands the responsibility that comes with being a member of the senior team. If they are not committed to the team, they need to find another “bus.”

Module 2 – Turning Team Talents into Results

This module does not start until all team members have made a commitment to being “on the bus”. Now, using the Team Dimensions Profile and Z-Process, the team is ready to learn how to capitalize on the “team talents” of each team member, and develop a process for working together to become a *high performance team*.

Module 3 – Accountability for Performance

Once the team has implemented the Z-Process and has been applying the *shared leadership* approach for some time, they are ready to *fine tune* their performance by focusing on their own individual contribution to the team. The Team Member Rating 360 degree questionnaire provides valuable feedback for senior team members to get feedback about their strengths and areas where their contribution could be improved. There needs to be a high level of trust in the team before embarking on this module.



Team Development Process™

Module One – “Getting on the Bus” (2-days)

Benefits	Session Content
<p>Team Alignment Questionnaire™</p> <p>This survey measures both the <i>Trust Level</i> in the senior team, and the effectiveness of communication about the <i>purpose, values, vision</i> and <i>goals</i>. It is re-administered at the end of Module 3.</p> <p>The results are <u>first</u> discussed with the CEO before being shared with team members at the workshop.</p>	<p>Pre-Seminar Benchmark</p> <ul style="list-style-type: none"> ▪ An internet based survey with 40 questions, and literal comments available on each question. ▪ Takes 15 to 20 minutes to complete. ▪ Part A measures each team member’s perception of the trust level in the team based on the four elements of trust: <i>openness, straightforwardness, acceptance</i> and <i>reliability</i> ▪ Part B measures each team member’s perception of how clear team members are on the <i>purpose, values, vision</i> and <i>goals</i>, and to what degree they are in agreement.
<p>Day One – Morning</p> <ul style="list-style-type: none"> ▪ Team members focus on what kind of organization they are building and why ▪ Team members gain an appreciation of the critical role that personal responsibility and accountability play in the team’s ultimate success ▪ Team members understand the impact that their decisions and behavior have on the <i>Team Climate</i> and the importance that trust plays in building this climate. 	<p>Focus on Team Alignment</p> <ul style="list-style-type: none"> ▪ <i>Vision Web</i> team activity – the power of teamwork. ▪ “What are we building and why are we building it?” ▪ Team Alignment – gaining <i>clarity</i> and <i>approval</i> for the organization’s purpose, values, vision and goals. ▪ The Elements of Trust and the trust level in your team. ▪ Primary challenges the team is facing at this time. ▪ Who is a “right person” for your team? ▪ The <i>Personal Responsibility Model</i>... what it means to be an <i>accountable</i> team member. ▪ Creating a <i>team climate</i> that will increase mutual accountability.
<p>Day One – Afternoon</p> <ul style="list-style-type: none"> ▪ Team members agree on the senior team’s purpose and how it aligns with the purpose or mission of the organization. ▪ Team members commit to the organization’s <i>core values</i> and agree on their own shared values by developing a <i>Team Code of Conduct</i>. 	<p>Focus on Team Alignment (continued)</p> <ul style="list-style-type: none"> ▪ <i>Determining Your Purpose</i>: identifying your team’s purpose and how it aligns with the organization’s purpose. ▪ <i>Values Motivation</i>: the impact personal values have on the interpersonal dynamics in a team. ▪ <i>Core Values</i>: how do your organization’s core values contribute to your team’s success? ▪ <i>Team Code of Conduct</i>: what values, beliefs and behaviors must your team operate by to become a <i>high performance team</i>?

Benefits	Session Content
<p>Day Two -Morning</p> <ul style="list-style-type: none"> ▪ Team members identify the <i>people skills</i> they need to create a <i>climate</i> based on <i>trust</i> and <i>personal responsibility</i> ▪ Clarification of the impact that differences in behavioral style have on how the team functions and the <i>trust level</i> in the team ▪ Increased awareness of the need for all team members to exercise the <i>discipline</i> necessary to create a <i>Responsibility-Based Environment</i> 	<p>People Skills</p> <ul style="list-style-type: none"> ▪ The four <i>People Skills</i> team members must have to build trust. ▪ The DiSC® Indra Profile... debrief of the report, and understanding your results. ▪ <i>DiSC® Theory model...</i> understanding the impact of differences in behavior on team effectiveness. ▪ DiSC® Indra Profile Group Report... how the behavioral styles of team members impact on the <i>trust level</i>, and the <i>culture</i>. ▪ <i>Facilitating Change</i> – helping team members see change as an <i>opportunity</i> rather than as a <i>threat</i>. ▪ <i>Interpersonal Flexibility</i> – identifying the characteristics of a flexible person. ▪ Increasing your interpersonal flexibility.
<p>Day Two - Afternoon</p> <ul style="list-style-type: none"> ▪ Increased awareness of the factors that have prevented trust from developing in the past, and what must be done to remove these barriers. ▪ Team members make commitments on what they must do both individually and as a team to increase the level of trust. 	<p>Team Trust Level</p> <ul style="list-style-type: none"> ▪ Debriefing the <i>Team Trust Report</i> – identifying strengths and barriers to increased trust. ▪ Strategies for increasing trust – what needs to be different in order to improve team trust level. ▪ Each team members identifies action steps and makes commitments to increase the trust level within the team.
<p>Two Follow-up Sessions</p>	<p>Keeping Commitments</p> <p>There are two follow-up sessions of 2 to 3 hours to review the commitments made by each team member and get feedback from each other about what is working and what is not.</p>

Module Two – Turning Team Talents into Results (2 Days)

Benefits	Session Content
<p>Day One</p> <ul style="list-style-type: none"> ▪ The senior team gains consensus on what it must do to build team alignment. ▪ The senior team understands what it must do to build a high performance team. ▪ Each team member identifies the unique talents that they bring to the team in terms of how the team operates, and gains a greater appreciation for the talents other team members contribute. 	<p>Focus on Team Talents</p> <ul style="list-style-type: none"> ▪ Review commitments made to each other to increase <i>Trust</i>. ▪ Stages of team development. ▪ Types of teams, and what it takes to become a <i>high performance team</i>. ▪ The Team Dimensions Profile – identifying the different <i>talents</i> team member have based on their <i>Team Role</i>. ▪ Understanding your own <i>Team Role</i>, the <i>strengths</i> you bring to the team and the <i>challenges</i> you need to be aware of. ▪ <i>Working with others</i> – understanding the <i>discomfort zones</i> of each Team Role. ▪ <i>Focus versus Flexibility</i>: collaborating with other team members to capitalizing on the talents of all.
<p>Day Two</p> <ul style="list-style-type: none"> ▪ The team learns to use the Z-Process – a <i>shared leadership</i> approach to turning ideas into results. ▪ Identification of the <i>team priorities</i> that must be addressed to achieve the organization’s <i>Vision</i>. 	<p>Focus on Team Process</p> <ul style="list-style-type: none"> ▪ <i>Understanding Team Priorities</i> – how differences in priorities affect the decisions made and the results achieved. ▪ The Z-Process... using the four <i>Team Roles</i>, <i>Creating</i>, <i>Advancing</i>, <i>Refining</i> and <i>Executing</i> to turn ideas into workable action plans and completed projects. ▪ Using the Z-Process to identify the organization’s <i>Vision</i>, and determine a <i>team performance challenge</i> for your team ▪ Identifying and establishing team goals... <i>What the team must achieve in the short term to achieve it’s vision</i> ▪ Prioritizing action plans and strategies for achieving the team’s <i>Vision</i>.
<p>Three Follow-up Sessions</p> <ul style="list-style-type: none"> ▪ Team members stay focused on the balance between their <i>individual accountability</i> and <i>accountability to the team</i> ▪ Plans are followed through on to achieve <i>business results</i> 	<p>Team Project</p> <ul style="list-style-type: none"> ▪ Between Modules 2 & 3, team members will implement the strategies identified in day 2 of Module 2 for those goals that are currently providing the greatest challenge for the team. ▪ Three follow-up meetings of 2 to three hours held monthly to get feedback on commitments to increase the <i>trust level</i> and check on progress towards achieving team goals.

Module Three – Accountability for Performance – (2 Days)

Benefits	Session Content
<p>Team Member Rating™ Provides each team member with direct feedback from their manager and colleagues relating to their contribution to the team in three areas:</p> <ul style="list-style-type: none"> ▪ Personal Contribution ▪ Interpersonal Contribution ▪ Task Contribution 	<p>Pre-Seminar Assessment</p> <ul style="list-style-type: none"> ▪ An internet based survey with 30 questions, and literal comments available on each question. ▪ Takes 15 to 20 minutes to complete on each person.
<p>Benefits:</p> <ul style="list-style-type: none"> ▪ The team develops fundamental skills for improving team openness ▪ Team trust levels are enhanced ▪ Team members gain an appreciation of the different listening styles of their colleagues. ▪ Improved communication skills between team members 	<p>Creating Conditions for Feedback</p> <ul style="list-style-type: none"> ▪ Review team action plans... a progress report on strategies for achieving the organization's <i>Vision</i>. ▪ Personal Listening Profile®... Understanding your natural listening approaches: when they work for you and when they don't. ▪ <i>Listening Adaptability</i>: Developing flexible listening skills when working with other team members. ▪ Improving communication and trust in the team with the <i>Giving and Receiving Feedback Models</i>. ▪ Johari Window... Practicing the art of giving and receiving feedback. ▪ Managing defensiveness reactions in self and others.
<p>Day Two</p> <ul style="list-style-type: none"> ▪ Team members identify ways they can increase their contribution to the team's <i>climate, process</i> and <i>results</i>. ▪ Commitments are made to lift the team to <i>extraordinary</i> levels of performance 	<p>Team Member's Individual Contribution</p> <ul style="list-style-type: none"> ▪ Each team member will receive their Team Member Rating™ report, a 360 degree assessment of how each other team member perceives their contribution: <ul style="list-style-type: none"> ○ <i>Personal Contribution</i>... to the team climate and level of trust ○ <i>Interpersonal Contribution</i>... to the team process and communication ○ <i>Task Contribution</i>... to the team results. ▪ Each team member will discuss their results with the rest of the team, and seek feedback on reinforcing their strengths and identifying areas where contribution can be improved. ▪ This session concludes with the development of <i>Action Plans</i> and a commitment from each team member to respond to the feedback provided.
<p>Two Follow-Up Sessions</p>	<p>Keeping Commitments There are two follow-up sessions of 2 to 3 hours to review the commitments made by each team member and Debrief results of a second Team Alignment Questionnaire™.</p>