



How can our team succeed?

Hi, I'm Tala Daya, a doctoral student in ME and I'm going to go over 3 simple steps to follow for team success. While these steps are simple, they're not easy. They require us to step back and constantly reflect on what we're doing and how we're doing it.

(Photo of an Executive MBA team working in the Applied Innovation class. No need to say that...just letting you know.)

## Step 1: Understand the Four Critical Components of Teaming -- Goals, Roles, Procedures, Relationships



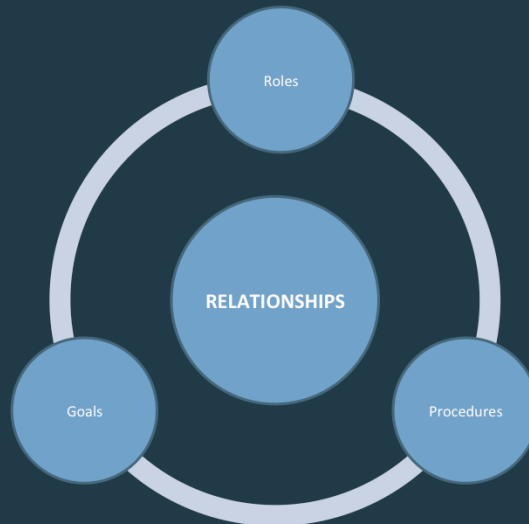
Step 1 is to understand the four critical components for successful teaming: Goals, Roles, Procedures and Relationships

Although they may be called something else or divided up differently, successful teams all deal with these 4 things somehow

- WHAT are you going to do? A shared GOAL establishes the direction for the team. Until the goal is clear, the other components won't be.
- WHO is going to do what? Well-understood ROLES define the specific contributions each team member will make
- HOW are you going to proceed? Clear PROCEDURES provide guidance for conducting the team's work
- WHY are you doing this at all? What values, life experiences and dreams motivate your team's members?

These 4 elements each change over time, and so does the relationship between them. For many teams, like the one here, the GOAL is primary.

### Step 1: Understand the Four Critical Components of Teaming: Goals, Roles, Procedures, Relationships



For other teams, the RELATIONSHIPS are primary. Many great companies began with the relationship. Bill and Dave of HP just wanted to work together as they supported their families and they tried out a lot of different goals before they hit on one that could make money.

According to one version of the story, Sergey and Larry of Google were roommates who just wanted to keep working together on their ideas while on campus without being bothered by classes...so they created Google as a college campus complete with places to sleep, 24/7 good food, and laundry facilities so they could do just that.

## Step 2: Build your collaborative plan

Team Name: _____ Date: _____	
Goals	
Roles	
Procedures	
Relationships	

Step 2 is to Build your Collaborative Plan. Your instructor will provide a template that looks like this one.

# Your GOALS

Team Name: \_\_\_\_\_ Date: \_\_\_\_\_

Goals

Roles

Procedures

Relationships

## Establish our Project Goal

**What** are my **personal goals (small g)** on this team?  
**What is the Project GOAL (big G)** we're all committed to achieve together? Is our Project Goal **scaled** to our resources (dreams, materials, skills, differences, etc.) and constraints (assignment, time, skills, etc.) What are the **metrics for success** for **what** we're producing?

You can start with your goals, including both personal goals and project goals.  
Are they scaled to your resources? How will you measure your success?

## Your ROLES

Team Name: \_\_\_\_\_ Date: \_\_\_\_\_

Goals

Roles

Procedures

Relationships

### Establish Roles

**Who** is responsible for which deliverables? Deliverables that require collaboration, subgroups & individual work? Do we need a project manager to coordinate? What are the deliverables **each person** is accountable to produce? **Who** does each person depend upon to be successful?

You might next look at roles. This is a place to discuss and consider how best to leverage the diversity on your team. Who will be responsible for what? What are your interdependencies? You will find that you have to return to this discussion often as you move through the innovation process and tasks change.

## Your PROCEDURES

Team Name: \_\_\_\_\_ Date: \_\_\_\_\_

Goals

Roles

Procedures

Relationships

### Establish Team Procedures

**Decision Making** - What process shall we use: consensus, majority rules, deference to expert, default to the loudest, or? **Effective Meetings** - Focus on key, timely decisions together vs. status/update (offline); meeting roles: scribe, facilitator, time keeper  
**Communication** - FTF: frequency, time, location; type of technology: (Googledocs, Hangout, etc.); expectations for responsiveness; 'best time to work' (AM, PM, weekends?)

Discuss the guidelines you would like to set for how to work together. How will you make decisions? How will you conduct your meetings? How will you communicate with each other?

## Your RELATIONSHIPS

Team Name: \_\_\_\_\_ Date: \_\_\_\_\_

Goals

Roles

Procedures

Relationships

### Establish Relationships

**Team Diversity** – What is the diversity on our team? Disciplines to tap for our solutions; learning styles for the stages of invention; overall team learning style strengths and places to supplement; cultural backgrounds we could tap on our team for perspectives on worthwhile goals, roles, procedures; languages we could interview in on our team; work experience we could leverage; dreams that could be tapped for shaping our goal **Listening** – How well do I listen to people I don't at first understand or agree with? Can I notice my own auto-rankism?

**Leverage diversity for our Goal** – How might we capitalize on our diversity to reach our goal? What's a **team name** that captures who we are and what we're going to do?

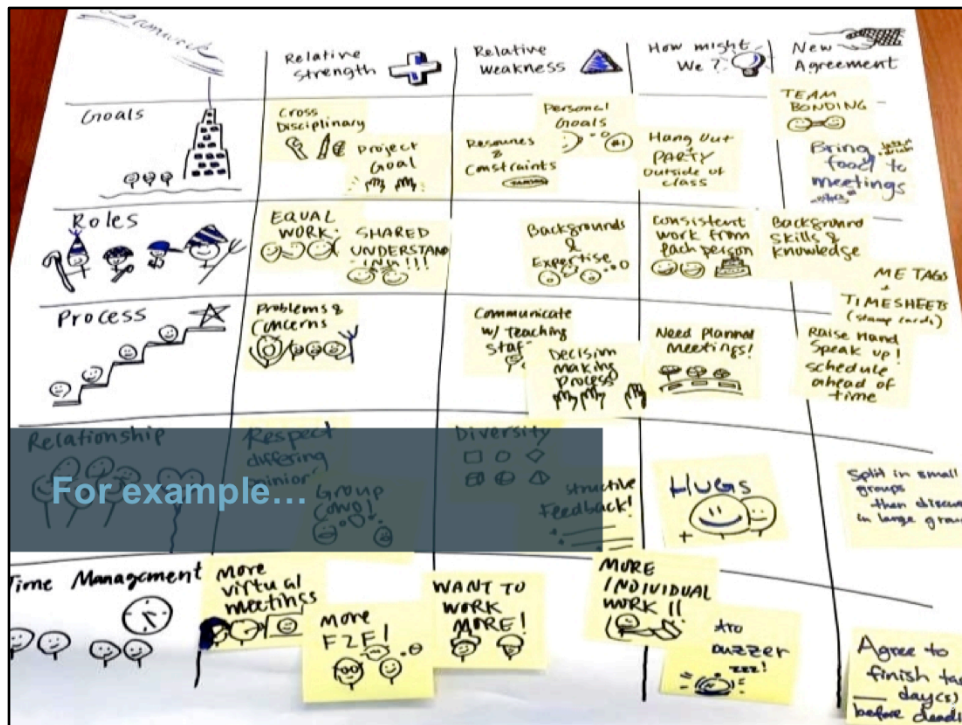
Discuss the diversity you have in your teams – in academic discipline, dreams for the future, work experience, learning styles, cultural backgrounds, languages spoken. How might you leverage your differences to create a higher impact or more challenging goal? How might your differences affect your procedures? For example, consider how might it benefit your team to get to proceed as you might in Madras or Madrid rather than in Berkeley, and get to know each other before you 'get to work.'



### Step 3: Review & revise as plans change

	Strength	Weakness	How might we?	New agreements
Goals				
Roles				
Procedures				
Relationships				

Step 3: Review & Revise as issues emerge or plans change.



Here's an example of how to review and revise your collaborative plan – and a preview of the homework after your mid-term Team Assessment!

Ok folks, I know this was a lot. If you get stuck, ask for help. Teaching staff is here for you.