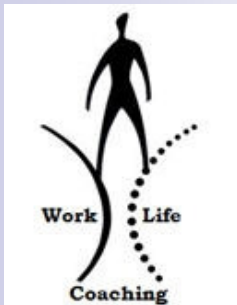


Team Building in a Matrix Environment

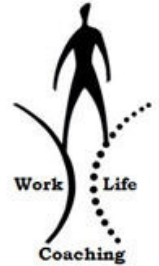
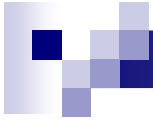
PM Tools – July 20th, 2010



Karen Davey-Winter

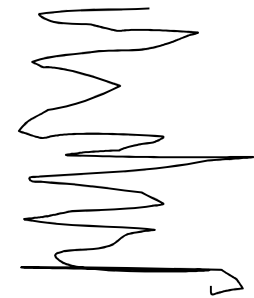
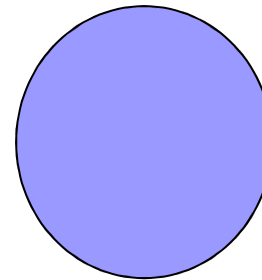
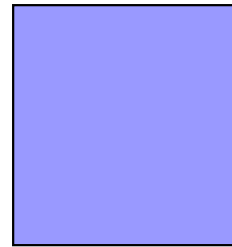
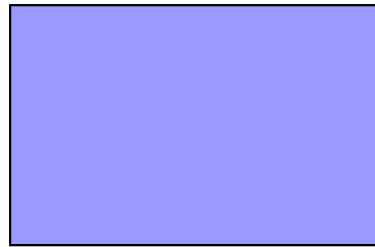
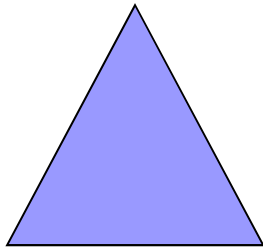
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“Helping people reach their professional and personal potential...”

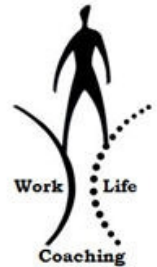


Introduction

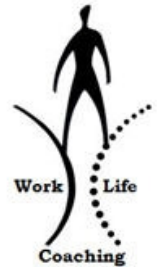
- What shape are you?



Contents



- What is a Team?
- What is a Matrix Team?
- Teams within Teams
- Bruce Tuckman - Phases of Team Development
- Team Building Techniques
- Patrick Lencioni – Five Dysfunctions of a Team
- Aligning the Two Approaches
- Questions?



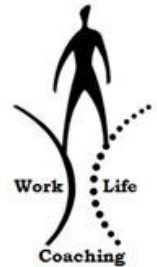
What is a Team?

■ Functional Team:

- Permanent team established to conduct operational activities for a particular part of the organization, such as finance, sales, marketing
- No specified time limit

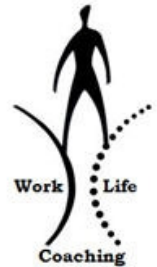
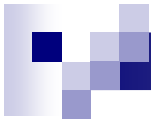
■ Project Team:

- Brought together for a discrete period of time to achieve a defined goal
- At the end of the project the team is disbanded



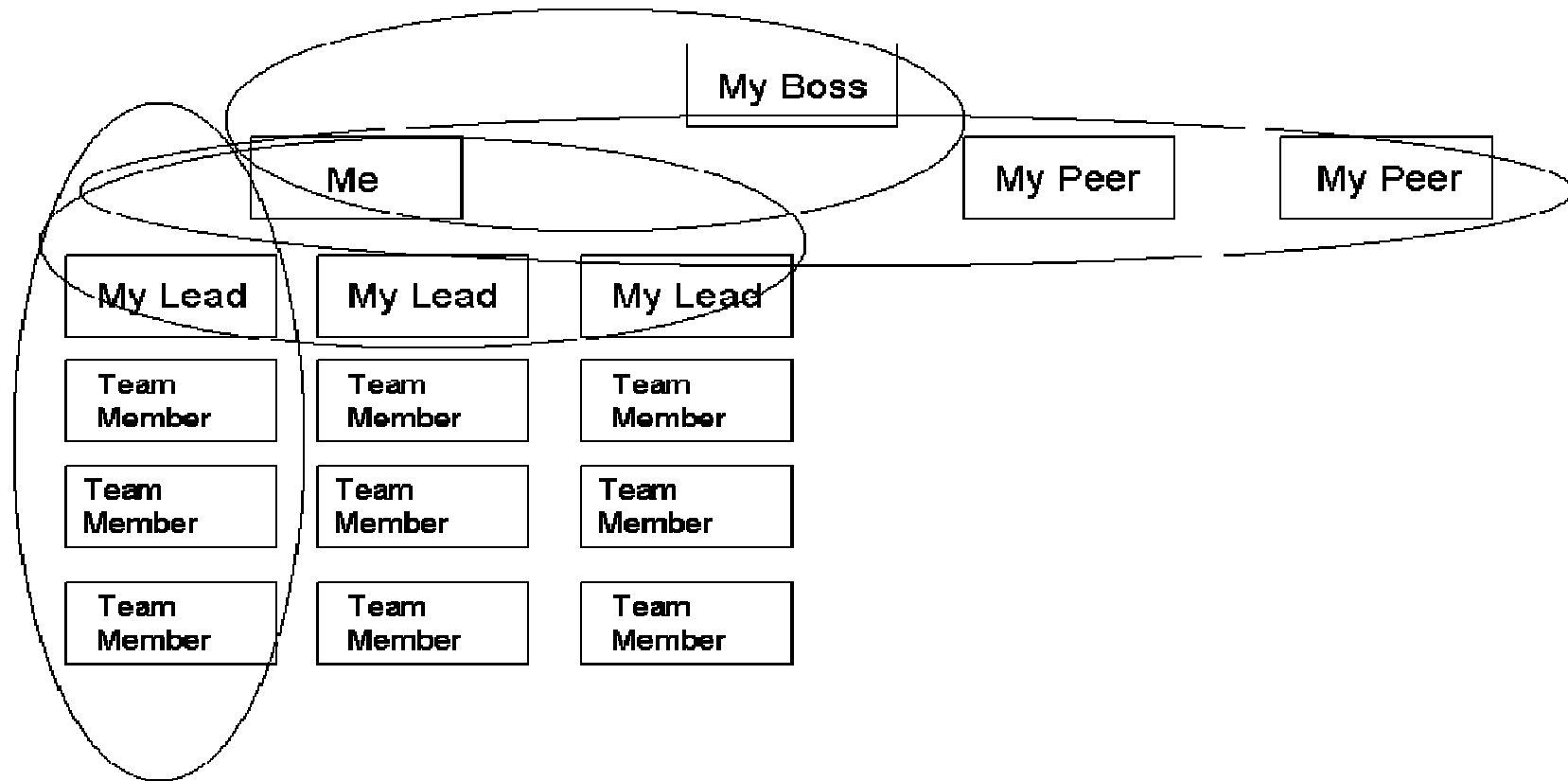
What is a Matrix Team?

- Wikipedia
 - **Matrix Management** is a type of organizational management in which people with similar skills are pooled for work assignments.
- PMBoK (3rd Edition) definition:
 - Blend of functional and projectized characteristics
 - Strong matrix, balanced matrix and weak matrix
 - Determined by the degree of direct authority a Project Manager has over their staff, funding, etc
 - Strong matrix – full time Project Managers with considerable authority and full time project administration staff
 - Balanced Matrix – recognizes the need for a Project Manager but does not provide the Project Manager with full authority over staffing and funding
 - Weak Matrix – Project Manager has no authority, is embedded within the organization, and plays more of a Project Coordinator role



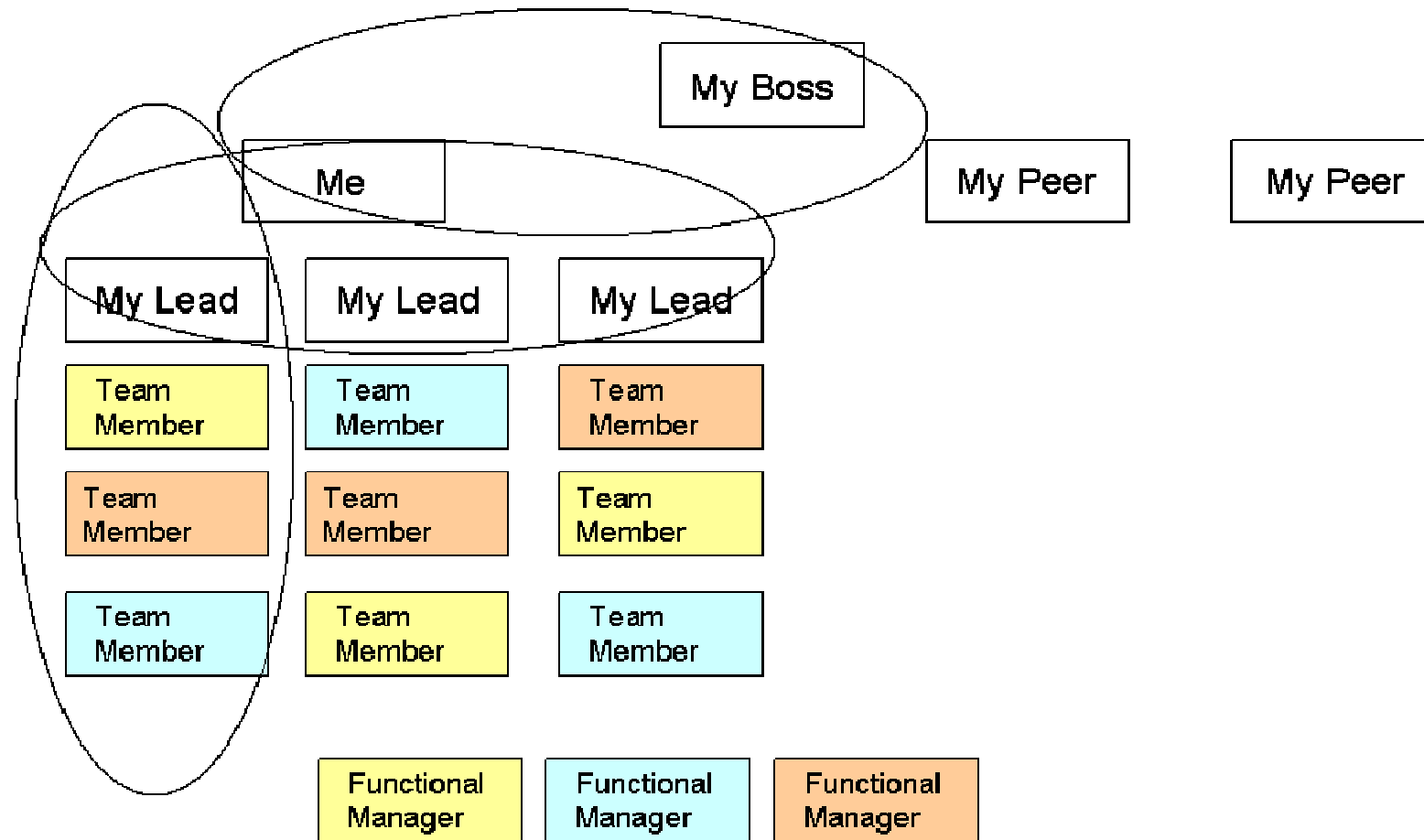
Teams within Teams

- Functional Teams are complex, and can look like this:

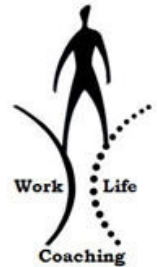


Teams within Teams

- Matrix Teams are even more complex, and can look like this:

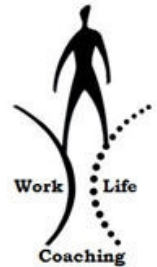


Teams within Teams



- Everyone is a member of more than one team in any organizational structure
- In matrix environments there are even more layers
 - Allegiance to the project is not created *by* the structure itself
 - Allegiance is a result of the relationships that are developed within the project team
 - Relationships in matrix teams can be more difficult to establish, more fragile, and more easily destroyed
 - Keeping a diverse group of people together in a matrix team depends on building loyalty and trust

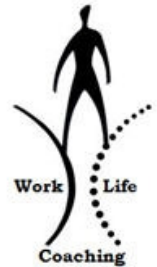
Bruce Tuckman – Phases of Group Development



Stage	Description
Forming	The team comes together, starts to understand the goals and boundaries, initiates the tasks, but each individual is still working somewhat independently. Managers need to be directive at this stage in order to steer the team toward the goal.
Storming	Ideas and approaches start to be exchanged about how the work can be accomplished, and this can result in conflict. This phase is critical for the growth of the team, and results in individuals learning ways to work together. Managers still need to be directive at this stage, and also accessible to ensure that conflict is resolved and the team is starting to move forward toward the goal.
Norming	The team starts to feel a sense of achievement, rules of operation (either formal or informal) are working, and trust begins to form. Managers start to be participative, and need to be available to provide guidance as the team continues to grow together.
Performing	The team is now maturing and often high performing. Work is accomplished, team members know how to work together, and even though conflict takes place it is managed and navigated with skill and can enhance productivity. The team requires very little supervision at this point and can largely make its own decisions.

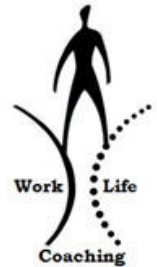
NOTE – adjourning was added later, to acknowledge that Project Teams disband after the project objectives are met

Team Building Techniques



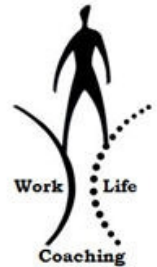
■ Mapping the techniques to the Phases of Development:

Stage	Team Building Activities
Forming	<ul style="list-style-type: none">○ Kick off meetings○ Establish team agreement○ Personality assessments○ Goal Definition○ Clear task assignment
Storming	<ul style="list-style-type: none">○ Delivery process definition○ Develop Conflict Management approach○ Executive Coaching○ Goal Reinforcement○ Clear task assignment○ Regular Status Updates
Norming	<ul style="list-style-type: none">○ Goal Reinforcement○ Executive Coaching○ Team building events○ Clear task assignment○ Regular Status Updates
Performing	<ul style="list-style-type: none">○ Regular Status Updates○ Recognition and Rewards
Adjourning	<ul style="list-style-type: none">○ Conduct lessons learned/post project review



Team Building Techniques

- Kick Off Meetings and Goal Definition – should include the following:
 - Purpose of the project
 - Roles and responsibilities
 - How the project fits into the organization’s overall goals can be understood.
- Helps establish context for the project
- Forming Phase

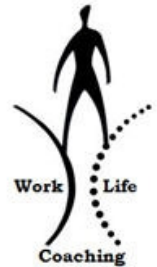


Team Building Techniques

■ Team Agreements:

- Establish as a group through a collaborative process to obtain buy in
- Establish ground rules for communication, boundaries, responsibilities, behavior
- Functional teams have this established in departmental policies and procedures
- Newly formed matrix project teams do not have this already established

■ Forming Phase

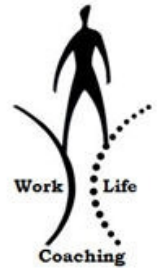


Team Building Techniques

■ Personality Assessments

- Can be conducted as part of an offsite team building session – half day to a day or longer
- Can bring the following advantages:
 - Understand how to use team members to play to their strengths
 - Understand communication styles and how to navigate those to get the best outcomes
 - Understand how people like to be managed/motivated to get the best result
 - Help shorten the process by which the team matures and learns to work together to get the results needed by the project

■ Forming Phase



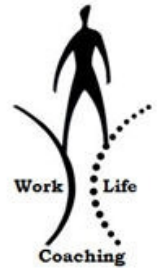
Team Building Techniques

■ Personality Assessments

□ Strengthsfinder

- Tom Rath's book
- Easier to do more of our strengths than it is to 'fix' our weaknesses
- 34 strengths are identified – the online assessment identifies the top 5 strengths for each person

■ Forming Phase

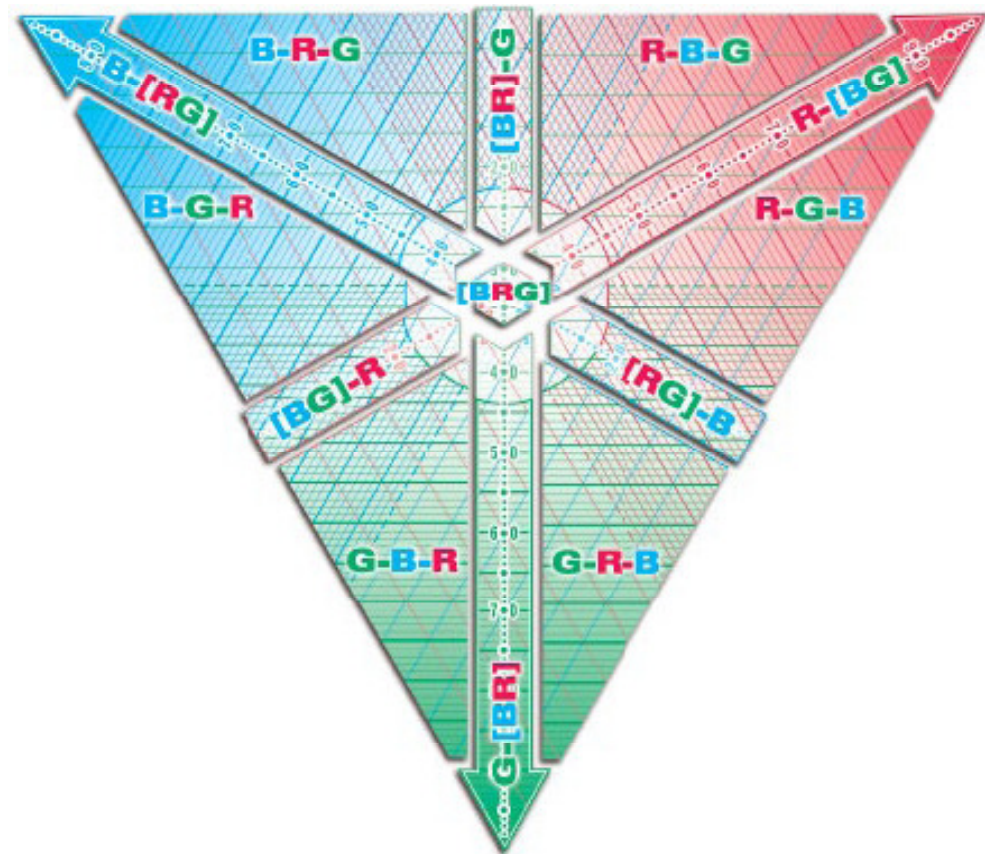


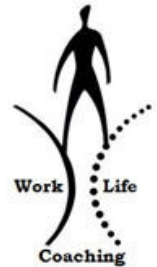
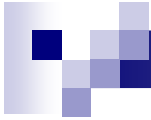
Team Building Techniques

■ Personality Assessments

- Strength
- Deployment
- Inventory

■ Forming and Storming Phases

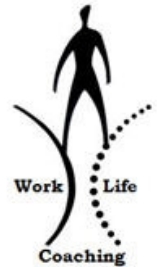




Team Building Techniques

- **Personality Assessments**
 - Myers Briggs
- Forming Phase for understanding team members
- Storming Phase for Conflict Management

ISTJ	ISFJ	INFJ	INTJ
ISTP	ISFP	INFP	INTP
ESTP	ESFP	ENFP	ENTP
ESTJ	ESFJ	ENFJ	ENTJ



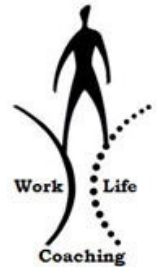
Team Building Techniques

■ Conflict Management Approach

- Conflict happens on any team
- Tools can help identify conflict styles:
 - Myers Briggs
 - Strength Deployment Inventory
- Take the initiative to establish a clear process for managing it
- Establish ground rules
- Can be part of Team Agreement
- Will help the team move more quickly through the 'storming' phase of group development

■ Storming Phase

Team Building Techniques

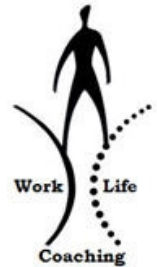


□ If you are...

	Extravert	Introvert
Extravert	<ul style="list-style-type: none"> • Listen while your colleague talks and then switch roles • Remember the last word is rarely the final word 	<ul style="list-style-type: none"> • Demand silence to think and listen • Share thoughts, even if you need to write them down first
Introvert	<ul style="list-style-type: none"> • Avoid overkill and redundancy • Say your piece and allow your partner time to respond 	<ul style="list-style-type: none"> • Do not avoid conflict by being silent • Work out issues together, not internally by yourself
	Sensor	Intuitior
Sensor	<ul style="list-style-type: none"> • Beware of overloading with facts and specifics • Check accuracy of details in dispute 	<ul style="list-style-type: none"> • Respect that specific facts may resolve conflict • Help colleagues see meanings and implications of details
Intuitior	<ul style="list-style-type: none"> • Consider the implications of what's being said • Avoid introducing so many details that the big picture is lost 	<ul style="list-style-type: none"> • Recognize that you both tend to "bend" facts to support your case • Check facts and ideas for accuracy before escalating conflict

From "MBTI Introduction Workbook", Hile Rutledge

Team Building Techniques

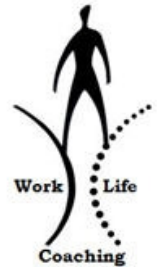


□ If you are...

	Thinker	Feeler
Thinker	<ul style="list-style-type: none"> • Know when to stop analyzing and competing • Recognize hurt feelings may arise from your disagreement 	<ul style="list-style-type: none"> • Remember that not all criticism is personal • Understand that it's ok to argue – stand your ground, state your position and objective
Feeler	<ul style="list-style-type: none"> • Remember whatever you say will be taken personally • Show your human side during the conflict – it's ok to say sorry! 	<ul style="list-style-type: none"> • Face the conflict – don't avoid it! It can be positive! • Don't press for resolution too early for the sake of harmony
	Judger	Perceiver
Judger	<ul style="list-style-type: none"> • Conflicts aren't scheduled, but resolving them can be • If issues are not resolved, don't say that they are just to bring closure 	<ul style="list-style-type: none"> • Recognize that your colleague might sound more angry than he really is • Taking time out to come back to the conflict later is acceptable
Perceiver	<ul style="list-style-type: none"> • Push for closure for a positive resolution – not to win and argument • Help your colleague focus on one issue at a time 	<ul style="list-style-type: none"> • Help each other stay focused on one topic at a time • Negotiate win-win solutions, or decide who will win or lose in each case

From "MBTI Introduction Workbook", Hile Rutledge

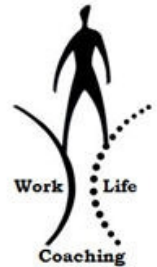
Team Building Techniques



■ Delivery Process Definition

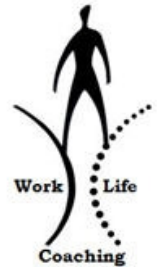
- Understanding how the work is to be accomplished
- Functional teams typically have the process for delivering the work established as part of the departmental rules
- The nature of each project may be different, so matrix project teams may not have initial stated rules for delivering the work
- For example, for a software development team determine which development lifecycle is to be followed, i.e. waterfall, agile, etc
- Otherwise confusion and a lack of productivity may result

■ Storming Phase



Team Building Techniques

- Goal Reinforcement – remind the project team of the following on a regular basis:
 - What the Project Goal is
 - How it fits into the Organization’s goals
 - How the Project team is critical to meeting the goal
 - How the individuals are critical to the team
- Easy to forget when the team is matrixed
- Storming and Norming Phases



Team Building Techniques

■ Executive Coaching

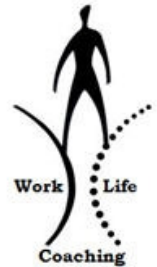
□ Facilitate team development

- Administer Personality Assessments
- Group Coaching – Conflict Management, Team Dynamics, etc

□ Facilitate individual leadership development

- Collaboration skills
- Negotiation skills
- Addressing personal or group blind spots
- Improving communication

■ Storming and Norming Phases

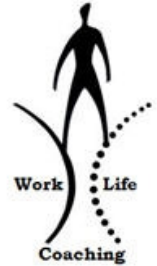


Team Building Techniques

■ Regular Status Updates

- Natural activity in a functional team - established status reporting routine
- For matrix project teams it is important that team members feel that they belong to the team, and can see how their progress affects the overall progress toward the goal
 - Weekly status meetings
 - One on one sessions
 - Project dashboards
 - Project status reports

■ Storming, Norming and Performing Phases

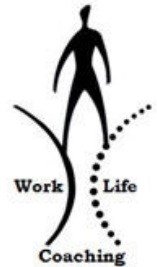


Team Building Techniques

■ Clear Task Assignment

- Assign work that is relevant, achievable and appropriately challenging
- Clarity is not necessarily provided by the structure itself, as it is in functional teams
- Explain how team members' roles in completing project tasks contributes to the success of the project

■ Forming, Storming and Norming Phases

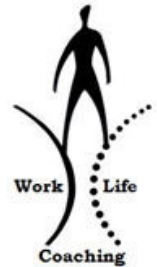


Team Building Techniques

■ Team Building Events

- Social events – participating in a social activity can create a team spirit that encourages people to support each other when they are at work
- Experiential Team building events
 - Construction Project
 - Mine Field
- End of project celebration – to acknowledge the success of the project meeting the goal

■ Norming Phase

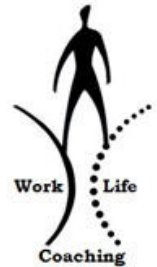


Team Building Techniques

■ Recognition and Rewards

- Always important to recognize people that either go above and beyond
- For matrix project teams can be especially rewarding for the team members, especially if it has taken some considerable work to get to the point of operating smoothly together as a team to achieve project goals
 - Simple thank you
 - Certificates
 - Bonuses
 - Gift cards

■ Performing Phase



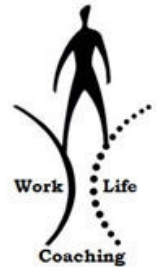
Team Building Techniques

■ Lessons Learned

- Conduct post project reviews
- Understand:
 - What went well
 - What could have been improved
 - Whether there were any surprises
 - Whether the project goals were met
- REMEMBER to spend enough time on 'what went well'!

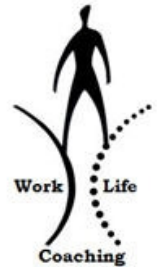
■ Adjourning Phase

Team Building Techniques



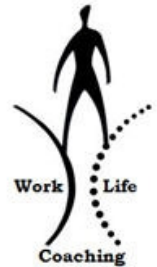
What other team building techniques do you use?

Patrick Lencioni's 5 Dysfunctions of a Team



From "The Five Dysfunctions of a Team", Patrick Lencioni

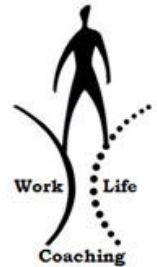
Absence of Trust



Absence of trust results in....	Trusting teams....
<ul style="list-style-type: none"> • Hiding weaknesses from each other 	<ul style="list-style-type: none"> • Are open about weaknesses and mistakes
<ul style="list-style-type: none"> • Not asking for help or providing constructive feedback 	<ul style="list-style-type: none"> • Accept questions or input about their areas of responsibility
<ul style="list-style-type: none"> • Don't offer help 	<ul style="list-style-type: none"> • Ask for help
<ul style="list-style-type: none"> • Jump to conclusions and rarely clarify them 	<ul style="list-style-type: none"> • Give the benefit of the doubt before jumping to negative conclusions
<ul style="list-style-type: none"> • Don't recognize or tap into each others strengths 	<ul style="list-style-type: none"> • Appreciate and look for ways to leverage strengths
<ul style="list-style-type: none"> • Waste time and energy managing behaviors for effect 	<ul style="list-style-type: none"> • Focus time and energy on delivering results, not politics!
<ul style="list-style-type: none"> • Hold grudges 	<ul style="list-style-type: none"> • Offer and accept apologies
<ul style="list-style-type: none"> • Dread meetings or team building events! 	<ul style="list-style-type: none"> • Look forward to meetings and team building events!

From "The Five Dysfunctions of a Team", Patrick Lencioni

Fear of Conflict



Fear of Conflict results in....	Teams that engage in conflict....
•Boring meetings	•Have lively meetings
•Toxic environments, backstabbing, politics	•Extract and exploit ideas of the team
•Not discussing topics that are critical to team success	•Solve real problems directly and quickly
•A failure to tap into opinions and perspectives of all team members	•Minimize politics, leverage perspectives and opinions
•Time wasted with posturing and interpersonal risk management	•Put critical topics on the table for discussion

From “The Five Dysfunctions of a Team”, Patrick Lencioni

Lack of Commitment



Lack of Commitment results in....	A team that is committed has....
<ul style="list-style-type: none">•Ambiguity among the team about direction and priorities	<ul style="list-style-type: none">•Clear direction and purpose
<ul style="list-style-type: none">•Not take advantage of opportunities due to excessive analysis and delay	<ul style="list-style-type: none">•Alignment around a common purpose
<ul style="list-style-type: none">•Lack of confidence and fear of failure	<ul style="list-style-type: none">•An ability to learn from mistakes
<ul style="list-style-type: none">•Decisions and discussions get continually revisited	<ul style="list-style-type: none">•Opportunities before competitors do
<ul style="list-style-type: none">•Team members try to second guess one another	<ul style="list-style-type: none">•An ability to move forward, or change direction, without hesitation or guilt

From “The Five Dysfunctions of a Team”, Patrick Lencioni

Avoidance of Accountability



Avoiding Accountability results in....	A team that holds one another accountable....
<ul style="list-style-type: none"> •Resentment among team members with different standards of performance 	<ul style="list-style-type: none"> •Ensures that poor performers feel the pressure to improve
<ul style="list-style-type: none"> •Mediocrity – lowest common denominator effect 	<ul style="list-style-type: none"> •Questions one another’s approaches without hesitation and identifies potential problems quickly
<ul style="list-style-type: none"> •Missing deadlines and deliverables 	<ul style="list-style-type: none"> •Establishes respect among team members and holds each person to same high standards
<ul style="list-style-type: none"> •Undue burden on the team leader as the sole source of discipline 	<ul style="list-style-type: none"> •Avoids excessive bureaucracy around performance management

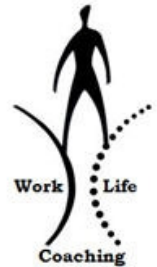
From “The Five Dysfunctions of a Team”, Patrick Lencioni

Inattention to Results



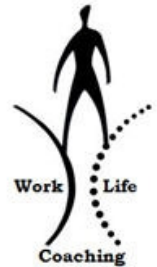
A team that is not focused on results...	A team that focuses on collective results....
<ul style="list-style-type: none"> •Stagnates/fails to grow 	<ul style="list-style-type: none"> •Retains achievement oriented employees
<ul style="list-style-type: none"> •Rarely defeats competitors 	<ul style="list-style-type: none"> •Minimizes individualistic behavior
<ul style="list-style-type: none"> •Loses achievement oriented employees 	<ul style="list-style-type: none"> •Enjoys success and suffers failure acutely
<ul style="list-style-type: none"> •Encourages team members to focus on their own careers and individual goals 	<ul style="list-style-type: none"> •Benefits from individuals who subjugate their goals for the goals of the team
<ul style="list-style-type: none"> •Is easily distracted 	<ul style="list-style-type: none"> •Avoids distractions

From “The Five Dysfunctions of a Team”, Patrick Lencioni



Absence of Trust

- Suggestions for overcoming:
 - Sharing personal histories
 - Team effectiveness exercise – share the single most important contribution one of your team members makes
 - Personality Assessments (MBTI)
 - 360 Feedback
 - Experiential Team Exercises
- The role of the leader – demonstrate vulnerability first



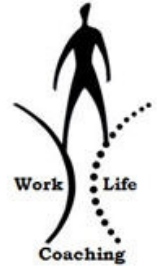
Fear of Conflict

■ Suggestions for overcoming:

- Mining – someone takes the role of miner for conflict and everyone stays in it until resolved
- Real-time permission – to engage in healthy debate
- Conflict Management Tools – Thomas Kilmann
Conflict Mode instrument (TKI)

■ The role of the leader

- Demonstrate restraint, allow conflict to progress naturally, don't over protect, model appropriate conflict management behavior



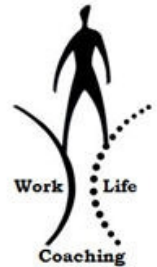
Lack of Commitment

■ Suggestions for overcoming:

- Cascade messaging
- Deadlines
- Contingency and worst case scenario Analysis
- Low risk opportunities to demonstrate decisiveness

■ The role of the leader

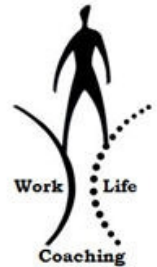
- Be prepared to make a decision, even one that turns out wrong, push the team for closure around issues and adhere to schedules



Avoidance of Accountability

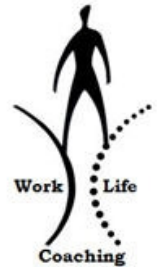
- Suggestions for overcoming:
 - Publish Goals and Standards
 - Simple and Regular Progress Reviews
 - Team Rewards
- The role of the leader
 - Allow team to self manage/regulate, and also be prepared to be the arbiter of discipline when the team itself can't achieve that

Inattention to Results



- Suggestions for overcoming:
 - Public declaration of results
 - Results-based rewards
- The role of the leader
 - Set the tone and focus on results

Aligning the Two Approaches



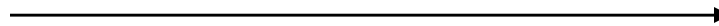
Tuckman

Forming

Storming

Norming

Performing



Lencioni

Building Trust

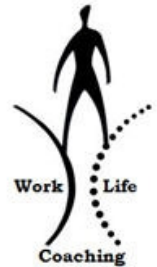
Managing Conflict

Building Commitment

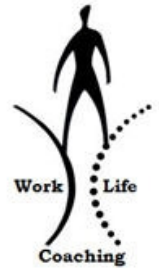
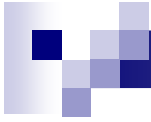
Demonstrating Accountability

Delivering Results

Aligning the Two Approaches



Tuckman	Team Building Activities	Team Building Activities	Lencioni
Forming	Kick off Meetings	Personal Histories	Trust
	Personality Assessments	Personality Assessments	
	Goal Definition	360 feedback	
	Team Agreements	Team Effectiveness exercise	
	Clear Task Assignment	Team Exercises	
Storming	Delivery Process Definition	Mining	Conflict
	Conflict Mgt Approach	Conflict Mgt Approach	
	Executive Coaching	Permission to Debate	
	Goal Reinforcement		
	Clear Task Assignment		
Norming	Regular Status Updates		Commitment Accountability
	Goal Reinforcement	Deadlines	
	Executive Coaching	Contingency Analysis	
	Team Building Events	Decisiveness	
	Clear Task Assignment	Cascade Messaging	
	Regular Status Updates	Goals and Standards	
		Progress Reviews	
	Team Rewards		
Performing	Recognition and Rewards	Public Declaration of Results	Results
	Regular Status Updates	Results based awards	



Questions?