TEAM ORKING WHEEL

Bonnie Cooper • Tom Gibbons • Jim Handyside



Team Management Systems Charles Margerison & Dick McCann

Team Working Wheel

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Almost 20 years ago Charles Margerison and I developed the Types of Work Model in an effort to describe the nature of work and the key tasks that form the basis of everyone's job. The data from the research study enabled us to define eight different work functions which were eventually arranged into a spatial model where adjacent work types defined similar work. Opposite work types described tasks requiring fundamentally different skills to do them well. A ninth activity common to all work functions was placed in the center of the model to highlight the importance of coordinating and integrating all the work functions.

The Types of Work Model has become a framework for analyzing individual jobs and for reviewing the performance of teams. Many teams in organizations throughout the world have benefited from the ideas in this model and have used it extensively to improve personal, team and organizational performance.

Bonnie Cooper, Tom Gibbons and Jim Handyside have taken the Types of Work Model as the basis for the Team Working Wheel – a practical tool to simplify the use of the Types of Work Model. When high-performing teams work on particular projects they tend to follow work patterns that ensure all key tasks are carried out to the highest standards. This Wheel will help you identify work patterns important to your current project and highlight the key words, phrases and questions that team members need to consider. Used regularly, this Wheel can give you a language and framework to improve individual and team performance.

I'm sure you will find this Wheel an essential tool for the success of your team.

Dick McCann Co-founder and developer of Team Management Systems

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Team Working Wheel

Introduction

The Team Working Wheel is based on the work of Drs. Charles Margerison and Dick McCann. In the early 1980's they undertook the task of answering the question "what makes teams successful?". Drawing on years of experience working with managers and teams worldwide and all levels in organizations, their research into this question produced the Types Of Work Model. Subsequently, a system of assessment instruments emerged, based on the core Types of Work Model, to assist teams, individuals and organizations create high levels of performance

The Team Working Wheel is a product that applies the Types of Work Model in a highly practical and varied way. This workbook begins with definitions, key words and phrases plus the critical question of each of the eight types of work and the integrating activity of linking that comprise the core model. A solid understanding of the eight types of work plus linking is invaluable in using the model well. The next section of the workbook looks at work patterns - moving around the Types of Work Model in specific patterns depending on the work being done. These patterns allow the team or individual to focus their efforts in a logical and consistent way to complete the work effectively and efficiently. We have provided some pattern templates as references that deal with common organizational situations to help build understanding of this concept of work patterns. The final section of the workbook provides blank templates that can be used and copied so you can produce your own work patterns specific to the work you and your team are involved with.

The actual Wheel is a summary of the key points, phrases and questions of the eight types of work and linking and is intended to be the key tool that you can use in an ongoing and regular fashion to help you and your team plan and do the work required of you. As you become more and more familiar with the Types of Work Model you will find that working with the Wheel will help you to conceptualize, plan and track your work in a highly effective way.

Best of luck using the Team Working Wheel as you and your team continue the journey of high performance.

Team Management Systems (TMS)

Team Management Systems is a global organization with offices in the United States, Australia, Singapore and the UK and plays an integral part in developing programs in leading organizations worldwide. The recognition of TMS internationally as the specialist in team development is testimony to its unrivaled quality and success in achieving tangible business outcomes.

Established in 1987, Team Management Systems mission is to assist organizations to achieve and maintain a competitive advantage, high productivity, and effective performance by developing the strengths of its people. TMS achieves this by providing a common language and practical framework, which assists people to maximize their potential as individuals, team members and leaders.

For more information visit www.TMS-Americas.com

Table of Contents

Definitions, Key Words, Phrases & Questions
of the Types of Work Model
Maintaining
Advising
Innovating
Promoting
Developing 1
Organizing 1
Producing1
Inspecting 1
Linking 1
Summary of Thinking & Actions 2
The Concept of Work Patterns 2
Sample Work Pattern Templates
Designing Something New
Decision Making 3
Problem Solving 3
Project Planning And Deployment
Making Improvements 4
Annual Planning 4
Work Pattern Worksheets 4

Definitions, Key Words, Phrases & Questions of the Types of Work Model



Maintaining Producing
Inspecting
NOTES
NOTES

MAINTAINING

The Maintaining function brings forward parameters that are critically important to the success of the team in a way that ensures they are understood and enacted. This means that the Maintaining function can have a broad application - from defining operating principles for a specific work process to the vision and values by which a team or an entire organization will operate.

The thinking required in the Maintaining function is probing and connected, focusing on what is fundamentally important to the situation at hand. For instance, if defining operating principles you would specify those principles that absolutely must be followed in order to consistently produce the desired results. When defining team vision and values you would define those things that would absolutely not be compromised as the team undertakes and accomplishes its work.

Actions in the Maintaining function apply what is important to the work being done and to the team in general. Action may involve the setting of standards and procedures or continuing refinement of how the vision and values of the team are played out on a daily and ongoing basis.

When done well the Maintaining function creates an understanding and structure for the team and its work that will align behavior in a practical way.

WHAT IS REALLY IMPORTANT?

This open-ended and probing question pushes the team to seriously reflect on the things that drive the work and the team on a continual basis. In order to do Maintaining work well the team must explore what is important at a deep level.

It is also very important to be extremely honest when engaged in this work function. It is often helpful to work with a variety of scenarios and tell these "scenario stories" to illustrate and build shared understanding about how the things that are considered really important can be identified and measured.

The parameters that are of fundamental importance become guides and standards that inform every aspect of the work as is it done.

KEY WORDS AND PHRASES OF THE MAINTAINING FUNCTION

Purpose defines the intent of the work, from both a large scale and subjective perspective to a small scale immediate perspective. Understanding purpose provides meaning to the work we do.	
Commitment illustrates a strong attachment to the work that is being engaged in and usually to the purpose of that work. Commitment is a personal choice to do what needs to be done to the best of your ability.	
Guidelines provide the boundaries for the work the team and individuals do. They are like a blueprint to follow that keeps the work consistent.	
Vision is an articulation of the direction in which the team wants the work they are involved with to move. Within the Maintaining function vision is considered to be oriented toward a broad application of direction.	
Values are the behavioral attitudes that the team or individuals follow as they do their work and move in the direction of their vision for that work.	
Alignment indicates a shared understanding and agreement of what needs to be done and how it will be done. It also means that the team acts on this understanding and agreement while performing the work they are engaged in.	
The Maintaining function is where standards are set. Standards provide qualitative or quantitative specifications in order to maintain consistent quality and results. The standards that are set need to reflect and support the vision, values and purpose.	
It is important to ensure that what is defined as important remains relevant and current. The team's environment and work is continually changing. Part of the Maintaining function requires a review of what is important to make sure these things still apply.	
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ADVISING

The Advising function involves the gathering and sharing of the information and knowledge which is relevant to the task at hand. This includes existing data that simply needs to be brought forward and new information that must be sought through an investigative process. Gathering information is undertaken with a clear understanding of what needs to be known and what purpose the information will serve. Information can become limiting if there is too much, so it is not sufficient just to collect any and all related facts; the search must be focused. Sharing information with other team members should be done in a 'matter-of-fact' manner with disclosure of sources and the level of confidence in accuracy. Sharing will require fielding inquiries and a willingness to pose more questions that may lead to a search for more information.

The thinking required in the Advising function is open, unbiased and inquisitive. It seeks to gain understanding from the information that is relevant to the work being undertaken. This understanding can then be applied to many of the other functions as the work progresses.

Activities in this function can be extensive. It may require polling large numbers of stakeholders for their input or simply gathering some existing data that is relevant and easily available. It is important to keep in mind that while factual data is important, the Advising function will also pay attention to intuitive data that may be difficult to prove. If it is important to the work it must be considered.

When the Advising function is done well, the team will have a good understanding of a broad range of things that will impact the work. The team will also use this understanding to inform the work in the other functions. In addition, the team will also have more questions that need to be answered.

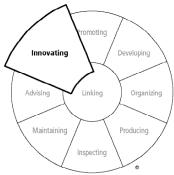
WHAT DO WE NEED TO KNOW?

This open question puts the Advising function in motion to collect and understand the information needed in the context of the work. It engages the curious nature of this work function and at the same time is very practical and basic. It promotes a search for what is relevant, important and real.

This question may lead to findings that are difficult and challenging or affirming and easily accepted. When working in the Advising function it is important to maintain a sense of neutrality - the information as it is found and the understanding that emerges is what brings value to the team's work.

KEY WORDS AND PHRASES OF THE ADVISING FUNCTION

Seeking	Seeking is an investigative process that is focused. The investigation is focused in a specific area and is unbiased about what may be found there.	
Assessing	Assessing in the Advising function is determining if the information gathered and shared is relevant to the work and how confident the team is in the accuracy of the information. It may also point to the need to gather, or share additional information	
Understanding	Understanding is the creation of our own picture of what we see. It is about taking the information we have gathered and creating specific meaning from it. It is important that the team share their understanding within the team and with others affected by their understanding.	
Knowledge	Knowledge is a generally accepted and transferable form of understanding. Knowledge is a shared understanding of a given situation.	
Open Minded	Open minded is not having any attachment to what might be found as information is gathered and shared. Information is neutral. It has no subjective or objective value until it is assessed and understood.	
Finding And Asking The Right Question	Questions direct attention and action. We may need to think about or gather information in a new way and questions help us to do that. Often, finding and asking the right question leads to a search for an answer that informs the work from that point forward.	
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INNOVATING

The Innovating work function involves creating ideas and possibilities that enable change and improvement. It is a work function that is always searching for the new, the different and the better. It is important to distinguish that innovation is not simply unbounded idea generation. It is directed toward the work the team is engaged in and recognizes fixed boundaries and parameters. At times the Innovating function will push and even break through these boundaries but the work is very focused and guided by the needs and outputs required. This function may create ideas for broad, dramatic changes and improvement or may direct incremental change that takes place over an extended period of time.

The thinking required in the Innovating function is expansive, challenging and accepting. While it is important to understand the boundaries of the work they should not be immune to challenge. An early phase in the innovation process requires acceptance of all ideas with an absence of judgment and a willingness to build upon the ideas of others. All of our thinking is based on assumptions we have about any given situation, including work. The thinking in this function is enabled if assumptions about the work are suspended to free up the generation of new and useful ideas.

Activities in the Innovating function are highly variable and may involve the application of techniques such as brainstorming, etc. Any technique that can help the team or individual expand their thinking should be considered and deployed as necessary to support the work in this function.

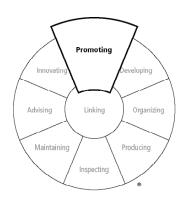
WHAT ARE THE POSSIBILITIES?

This open and searching question captures the expansive spirit of the Innovating function. It is a question that stimulates exploration and play, in the search for ways to make things better. There does not have to be closure to this question, it does not have to be answered with a single, correct response. Closure is achieved as a team carries its ideas to the other work functions.

To be able to respond to this question effectively, there must be the freedom to explore all ideas without judgment, without evaluating the value of the idea.

KEY WORDS AND PHRASES OF THE INNOVATING FUNCTION

Possibilities	Possibilities represent a range of ideas that are informed by the boundaries of the situation but are not constrained by those boundaries. Generating possibilities is enabled by recognizing boundaries as assumptions about the work we are engaged in.	
Alternatives	Alternatives are different methods of doing something while producing the same or better results	
Diverging	Diverging is an expanding process that creates more ideas and builds on others. Work in the Innovating function will generate lots of ideas. They will be critically analyzed later.	
Change	The Innovating function provides the ideas and possibilities that are required for change. Change is not implemented within the Innovating function but moved to another function for further development.	
Challenging The Status Quo	While working in the Innovating function there is dissatisfaction with what is. Ideas are generated that are constructively different than what now is in place or the ideas are based on different assumptions.	
New Ways Of Doing Existing Things	Innovating work involves constantly questioning how things are being done and a search for ideas to continually improve. These are often small, incremental changes that over time can have significant impact.	
Connecting Ideas With Needs And Needs With Ideas	Ideas exist everywhere and so do needs. Sometimes work in the Innovating function is not about coming up with something new, but about taking an existing idea and applying it in a different situation. This can produce highly practical improvements that have already been proven in other areas.	



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PROMOTING

The Promoting function brings the team's ideas out into the open in order to gather support and acceptance. This may be sought from people who need to assist in moving the ideas forward or those who will be affected as those ideas become reality. Ideas may need support in the form of concrete resources, or commitment to make them work as they are implemented.

It is important to identify as many key stakeholders as possible in this function and then present ideas in a way that it is appropriate for their unique needs. Work in the Promoting function requires building an understanding of what you need from those you are trying to influence and what they need from you. This requires a good knowledge of the stakeholders involved and flexibility in the ways in which you will influence them.

The thinking required in the Promoting function is adaptable, visible and supportive. It is important to create a positive environment in which to bring ideas forward so they will be understood and accepted.

Actions in the Promoting function are diverse and involve a variety of approaches. Examples include: sales or marketing presentations; meetings with groups to help them understand and involve them; or perhaps quietly gaining support for your ideas by talking with colleagues in a casual way about your ideas and their benefits.

When the Promoting function is done well the team will have positively influenced the key people needed to move forward with their ideas.

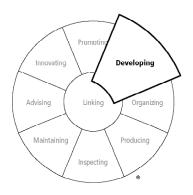
WHO NEEDS TO KNOW ABOUT THIS?

This open and focused question pushes the team to identify as many stakeholders as possible that need to be influenced in order for the ideas and work to move forward. In addition it is important to consider how those stakeholders should be influenced so the team has the best chance of gaining support.

Sometimes the Promoting function is not only about promoting ideas. It is a good idea to generally promote the valuable work the team does on a continual basis so the team's profile is a positive one. This ongoing internal promoting can be very valuable so the team is seen in a positive light when support for ideas is eventually needed.

KEY WORDS AND PHRASES OF THE PROMOTING FUNCTION

Influencing	Influencing is representing your ideas in a way that allows others the opportunity to see them in the same fashion as you do. Influencing requires a good knowledge of your ideas and the group or individual you are communicating with.	
Convincing	Convincing involves explaining your ideas in a way that builds both understanding and agreement.	
Explanation	Promoting generally requires a thorough explanation - an active demonstration that generates understanding by connecting information to relevant work requirements.	
Buy-In	Buy-in means that the group or individual you are targeting actively support your ideas and are committed to do what is required for the work to be successful.	
Impression	An impression is a subjective understanding that may lack validation or be based on intuition. The Promoting function, especially ongoing internal promoting, is about creating positive impressions of the team and their ideas in a general sense.	
Identifying Stakeholders	It is critical to know who needs to be informed of your ideas and intentions. Identifying stakeholders is a key activity that should occur early in the Promoting process.	
Internal And External Selling	Promoting has both an internal and external focus depending on the work being done. The team needs to be sure it has not overlooked important stakeholders, especially those internal to the team or organization.	
Image Making	Promoting involves the creation of positive pictures of our ideas - images of what we want to do. If these resonate with people the team will build the support needed for success in their work.	



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DEVELOPING

The Developing work function takes the ideas that the team thinks will work well and tests them against a variety of criteria. The intent is to come to a conclusion regarding what idea to move forward with. This work function involves analysis and decisions about the feasibility of ideas and the best way to put those ideas into action. Developing requires a good knowledge of the entire scope in which an idea will play out. It is very important to make sure that the criteria you test ideas against are thorough and comprehensive. This may require an in depth understanding of key stakeholder needs and expectations, resource constraints or the capacity of people and systems required to make the idea work well. The Developing function may deal with testing out a small improvement to an existing work process all the way to deciding to allocate considerable resources to a large, new organizational initiative.

The thinking required in the Developing function is objective, analytical and decisive. It is convergent thinking - leading to a conclusion after the consideration and analysis of options.

This function's activities can cover a broad range and may be relatively simple and quick or extensive and far reaching. They may include simply bouncing some ideas for a work improvement off teammates to get their thoughts, all the way to market surveys and product test runs.

When the Developing function is done well, the team is confident that decisions to move forward make sense and that they will be able to implement them effectively.

WHAT DO WE MOVE FORWARD WITH?

This question illustrates the analytical and decisive nature of the Developing function. It is not a question that can be answered without critical investigation and consideration of alternatives. The team needs to look at options from numerous perspectives and test them out before drawing conclusions.

If this question can be answered with confidence the team is ready to move forward to the next step of making their ideas reality.

KEY WORDS AND PHRASES OF THE DEVELOPING FUNCTION

Testing	Testing is an exploratory process that provides specific and concrete evidence. When testing options it is very important to know what is being examined and use a consistent method for testing.	
Analysis	Analysis involves a critical examination of the options and will address as many of the areas affected by the final decision as possible. Analysis is only possible when there is comparative data to examine. This data will come from the testing of options.	
Objective	Decisions made in the developing function need to be impartial and fact-based. For instance, even if testing the way subjective values should be played out on the team it is necessary to have impartial facts available to work with.	
Converging	Converging is a narrowing down process - it provides a good image of what the developing function does. It takes a number of options, and lots of data and converges on a conclusion.	
Identifying Value	The testing process will illustrate the comparative value of various choices and decisions. It is important to identify the value of a decision so that the positive impact of that decision is understood.	
Clarifying Risks	The other side of identifying value is to know the risks inherent in a specific decision. Knowing the risks involved can dramatically affect whether or not a decision is worth making. Knowledge of the risks also assists in planning to reduce or overcome those risks should a decision be made to move forward.	
Assessing Capabilities	It is very important to know if the team or organization can actually do what is expected. Part of the developing function and the analysis that occurs here must assess the capabilities required to enact a decision. Capability assessment may consider technology, financial resources, personal skills and many other areas.	



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ORGANIZING

As a team works in the Organizing function it establishes systems, structures and resources so that work can occur in an effective and efficient way. This organization ensures that everything required for the work is in place. The people involved know the components of the work, how it is to be done and when. The planning aspect of organizing is tactical and detailed and may include resource management, task allocation, schedules or work structures. Communication of plans is also required for organization to effectively support the team's work. It is also important to be sure that what is being planned and organized is realistic and practical and that those required to carry out plans have the ability to do so.

The thinking required for organizing is logical, realistic and linear. The flow of the work is logically depicted in a way that clearly supports consistent and effective work. It is often a good idea to make the planning visible so others can trace the flow of work to ensure details are not overlooked. When the team engages in the thinking involved in organizing, the plans are more likely to be complete with all the necessary components in place for effective work.

Actions in the Organizing function are diverse and range from assigning a couple of new tasks to a team member to producing complicated work flow charts with dozens of people and significant resources deployed.

When the Organizing function is done well a practical plan is laid out and well communicated that allows the work to be completed in an effective manner.

WHAT NEEDS TO BE IN PLACE TO ENSURE THIS HAPPENS?

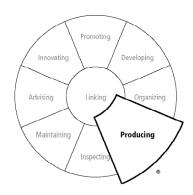
This question illustrates the scope of the Organizing function and reflects the level of detail that is needed to do it well. The work must be considered from all perspectives with needs recognized and addressed so that the work can flow effectively.

Part of the Organizing function is to be sure that those involved understand what is expected of them as a result of the things put in place and that they have the ability to do those things.

The Organizing function creates an understandable blueprint for executing the work that needs to be done.

KEY WORDS AND PHRASES OF THE ORGANIZING FUNCTION

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Structuring means putting things in place that define the boundaries within which the different parts of the work will happen. It creates a clear framework to understand the flow of the work.	
Scheduling is establishing the details of when things will happen and usually includes who or what will do these things. Clear timeframes are set and communicated.	
Planning in the Organizing function tends to be short term and practical but does not exclude long range planning. Generally though, the plans in this work function have clear cut goals and expectations that will be realized in the short term or in a regular repeated pattern.	
Mapping refers to a visual picture of the flow of the work being done so it can be seen and understood by others. A variety of maps can be used such as Gantt charts, flowcharts or mind maps.	
Establishing systems for the work defines and directs how the work will be done in a way that reduces variance to a minimum. An effective work system will produce consistent results in an ongoing fashion.	
Resource management is about making the best use of the things the team has available to ensure the work will be done well. Establishing what, when and how resources will be used is fundamental to this function.	
The allocating of people, places and materials is much like resource management but this phrase implies the need to communicate this allocation effectively so people or groups have a clear understanding of what is expected of them.	
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PRODUCING

The Producing work function is where the works get done; where something tangible and concrete is created or a service is delivered. It is not enough just to produce - it must be done efficiently and effectively. This function often comprises a large share of our work environment or time spent, and is the end point of many of the other functions around the Types of Work Model. When other work functions are performed well the Producing function will be relatively smooth but this does not mean it is effortless or automatic.

The thinking that is required in the Producing function is sequential, practical and consistent. It must also be made visible in order to be replicated by others when necessary. Producing is not simply action - it requires disciplined and focussed thinking so that outputs are consistent and effective.

Actions in the Producing function will activate the processes, systems and methods that have been designed to create the outputs required. Actions will be directed at producing a variety of results. For instance producing work involves the effective operation of equipment, the application of a standard operating procedure, or using a sound problem solving process to resolve a problem.

ARE WE EFFECTIVELY AND CONSISTENTLY DELIVERING WHAT IS EXPECTED?

This closed ended question captures the essence of the Producing function. The delivery of products or services to meet expectations is the goal when producing. Producing is also about delivering that output effectively and efficiently and on a consistent basis.

While the Producing function creates tangible outputs it is important to keep in mind that those outputs are the result of activating the systems and processes designed for the work. It is an active function leading to a tangible and concrete end point.

The work of the other functions often culminates in what the Producing function creates in a practical and valuable way.

KEY WORDS AND PHRASES OF THE PRODUCING FUNCTION

Implementation	Implementation means putting plans into action. It is an active term which is very descriptive of the Producing work function. All the work leading to this point will be put into action.	
Process	A process is the method by which something is done. Within the Producing function it is important that work processes be highly visible.	
Operational	Operational indicates the execution of a repeatable process to produce a consistent output. Much of what is done in the Producing function will have these repeatable processes.	
Effective	Effective means that the process being used to produce the necessary output produces it in a consistent manner over time.	
Efficient	Efficient means that the process being used to produce the necessary output uses the least amount of resources possible while still being effective.	
Activating	Activating converts potential into activity. The Producing function takes the work from the other functions and puts it into action.	
Getting It Done	This phrase sums up the Producing function nicely. After all is said and done, work is about doing things of value. The Producing function is about doing those things.	
Doing It Well	When the Producing function is done well it creates a sense of reliability. The team can be counted on to deliver what is expected of it and feels comfortable in making commitments regarding their producing capacity.	



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INSPECTING

The Inspecting function ensures that the work being done adheres to agreed upon standards on a continual basis. Inspecting work makes sure there is consistency in work processes and work outputs. Inspecting requires a good knowledge of the work being done and clarity regarding what you are looking for. Inspecting will require measurement of compliance to standards and these measurements may be highly specific and objective or more general and subjective. For example, inspection of work that produces a product will apply the specifications for the product and use appropriate and detailed measurements. Inspection may also confirm adherence to the values the team or organization has set for itself. This will require more general and subjective measurements, often determined through discussions about behavior desired across a broad range of circumstances.

The thinking required in the Inspecting function is practical and detailed. It requires a comprehensive and disciplined examination of evidence to determine if the work is meeting standards.

Actions associated with Inspecting will involve reviews of the work processes, measurement of outputs and a comparison to established standards. Sometimes formal audits of the work are used to accomplish this work. It is often most effective to have the Inspecting function incorporated directly into the work process so that feedback from this inspection can be immediately used to keep the work on standard.

When the Inspecting function is done well it produces confidence and proof that the work is doing what it was intended to do.

DO WE CONSISTENTLY CHECK TO ENSURE WE ARE ADHERING TO STANDARDS?

This question mirrors what the Inspecting function is all about. It is a closed ended question that can be answered with a brief response, often by a simple yes or no. It is not enough to just answer yes or no however. You must be able to justify your response with tangible evidence.

The Inspecting function also requires you to go further than the quick response, and review what the data gathered from the checks and inspections is telling the team about the work. This review allows the team to better understand their work processes and where improvement opportunities may be present.

The Inspecting function is both a check and review of the end point of a work process and a start point in identifying improvements.

KEY WORDS AND PHRASES OF THE INSPECTING FUNCTION

Specifications define the how the work is done and what the work produces. They may be specific or general and can be described and measured.	
Measurement is an action that gathers specific data that is relevant to the work being done. It is critical to insure that what is measured accurately reflects the data you need to have for inspecting to be effective.	
Feedback is the capacity to gather data about what is happening with the work being done. Feedback enables understanding of what is happening with the work and incorporating this understanding back into the work for continual improvement.	
Reviewing work process and outputs is about taking the time to look at the data that has been collected regarding what the work is actually doing and comparing it to what is wanted and needed.	
Audits are formalized review processes generally undertaken so the results regarding the adherence to standards of the work can be communicated and acted upon consistently. Audits tend to provide historical data.	
Quality assurance means that processes are in place that create a very high probability that the work being done will continually meet standards.	
The Inspecting function requires the team or individual to make sure that what is being done, consistently meets the standards that have been set for that work. It is not enough to assume that standards are being met; inspecting means you can prove it.	
When the Inspecting function is done well, the team, as well as other stakeholders have confidence that the work is being done consistently well. In addition, there is access to feedback about the work that allows for continual improvement.	
	and what the work produces. They may be specific or general and can be described and measured. Measurement is an action that gathers specific data that is relevant to the work being done. It is critical to insure that what is measured accurately reflects the data you need to have for inspecting to be effective. Feedback is the capacity to gather data about what is happening with the work being done. Feedback enables understanding of what is happening with the work and incorporating this understanding back into the work for continual improvement. Reviewing work process and outputs is about taking the time to look at the data that has been collected regarding what the work is actually doing and comparing it to what is wanted and needed. Audits are formalized review processes generally undertaken so the results regarding the adherence to standards of the work can be communicated and acted upon consistently. Audits tend to provide historical data. Quality assurance means that processes are in place that create a very high probability that the work being done will continually meet standards. The Inspecting function requires the team or individual to make sure that what is being done, consistently meets the standards that have been set for that work. It is not enough to assume that standards are being met; inspecting means you can prove it. When the Inspecting function is done well, the team, as well as other stakeholders have confidence that the work is being done consistently well. In addition, there is access to feedback about the work that allows for continual



NOTES

LINKING

Linking is the central activity of teamwork that co-ordinates and integrates the work functions. It defines the skills that pull these work functions together in an effective and timely way. Linking is situated at the center of the Types of Work Model to illustrate this. It can be thought of as a set of skills that keep track of the big picture of the work that is going on and is on the lookout for what should be considered next. When these skills are put together they help to produce a highly effective team that works together well to produce the results expected of it. It is important for every member of the team to pay attention to the Linking function. When this occurs each member is focusing not only on their own, individual contributions to the work but also is aware of developments that would be of value to the entire team and making sure these things are communicated and acted upon.

Thinking in the Linking function is relational and patterned. It focuses on the relations between the different work functions and finds the patterns that emerge due to these relationships.

Within TMS Linking is divided into three distinct areas – Linking of People, Linking of Tasks and Leadership Linking.

The Linking of People skills comprise:

- Active Listening
- Communicating
- Team Relationships

- Problem Solving And Counseling
- Participative Decision Making
- Interface Management

The Linking of Tasks skills comprise:

- Objectives Setting
- Quality Standards
- Work Allocation
- Team Relationships Delegation

Leadership Linking is a fundamental skill for team leaders and covers the additional skills of:

Motivation

Strategy

It is important to recognize that while these skills can be separated out and developed, the concept of linking can be considered on its own as the capacity to see the big picture and the patterns that are part of that big picture.

When the Linking function is done well the team is a cohesive and effective group that contributes value to the organization.

KEY WORDS AND PHRASES OF THE INTEGRATING ACTIVITY OF LINKING

Awareness	Awareness is a key aspect of Linking. It means being open and receptive to what is happening within and around the team and recognizing what is important at the moment and ongoing. Awareness may be enhanced in many ways, some of which are listed as specific Linking Skills.	
Communicating	Communicating is sharing your awareness with others. This sharing allows others to become aware as well and then act as necessary from a variety of perspectives.	
Connecting	Connecting means bringing things or people together in some fashion. By establishing connections, information, ideas and coordination is enhanced and the work progresses smoothly.	
Flow	Flow creates an image of continual movement. Linking creates a continual movement to the work that is smooth and effective. Good Linking can create flow of movement to the work being done that makes even very difficult tasks seem easier.	
Coordinating Tasks And People	Enabling people and specific tasks to work well together is a critical part of Linking. This means that there is a match in the timing of the work and the capacity of those involved so that the work has a noticeable flow.	
Big Picture	The big picture of the work being done is about seeing how the work connects to other things and people. This means you must distance yourself from the details of the work so that you can see these connections.	
Recognizing Patterns	Patterns are repetitive sequences of events. To be aware of patterns you must look at the big picture of the work being done. Being able to recognize patterns allows you to predict what will be happening next and act in advance if necessary.	

NOTES	HOW DO THE WORK FUNCTIONS CONNECT?			
	This question can be considered in a general sense and is the foundation of the thinking behind the idea of Work Patterns. It can also be considered specifically to the work being focused on by the team at the present time. By continually keeping this question present as the work moves along the team can keep one step ahead and maintain an effective flow to the work.			

SUMMARY OF THE THINKING AND ACTIONS OF THE TYPES OF WORK MODEL

Work Function	Types of Thinking	Possible Actions
Maintaining	Probing And Connected	 Setting of standards Refinement of vision and values Creating guidelines
Advising	Open, Unbiased And Inquisitive	 Market research Assessing current data Sharing understanding of work processes
Innovating	Expansive, Challenging And Supportive	 Brainstorming Idea generation in the absence of judgement Challenging the status quo
Promoting	Adaptable, Visible And Supportive	 Presentations Information meetings and mailings Building a business case to support ideas
Developing	Objective, Analytical And Decisive	 Idea or product test runs Cost – benefit analysis Capability assessment
Organizing	Logical, Realistic And Linear	 Short term planning Project mapping and resource allocation Establishing work processes
Producing	Sequential, Practical And Consistent	 Activating work processes Collecting work process data Continuous improvement activities
Inspecting	Practical And Detailed	 Measuring outputs Comparing measurements against established standards Reviewing performance
Linking	Relational And Patterned	 Keeping people and tasks connected Seeing and acting on the big picture Developing work patterns

The Concept of Work Patterns

THE CONCEPT OF WORK PATTERNS

Any work that we engage in will follow a sequence of some sort. Work activities occur in a time bound fashion one activity after another. We will often plan out the sequence of our work activities so the work we do follows a logical pattern to get the work done effectively. The patterns we develop will match the needs of the work being done plus the preferences we have in approaching work in general. As the work becomes more complex the patterns we generate to complete the work tend to become more specific to our own particular viewpoint.

In addition, we tend to develop our work patterns at a very specific task level so they often become to do lists. This is a necessary and valuable way to approach work but it can become cumbersome when groups need to work together, when we are in the planning stages of work, when the specifics of the work are not clear, or when we need to explain how we are approaching a project from a general level.

The Types of Work Model assists us in developing patterns for the work we are engaged in by providing some key things:

- A higher level view and orientation to the types of work needed that can then be broken down to specific tasks.
- A common language that can be used by teams and individuals to discuss and communicate how a specific project needs to be approached.

By developing work patterns using the Types Of Work Model:

- A team's work will be more effective since team members direct attention and effort to the necessary work following an agreed to and understood pattern.
- The team will work more efficiently and synergistically since team members direct attention and effort to the same type of work at the same time.
- The team will have an effective means to track and analyze the progress of work being done without getting lost in the specific details of the work.

The following pages contain sample work patterns that can be used as a reference or guide as you create your own work patterns specific to the work you are involved with.

Pattern Templates

The following patterns are provided as examples and templates that can be applied or adapted to specific situations. They are not intended to be definitive answers to the organizational situations we face, nor do they contain the amount of detail that would actually be required. The approach is a bit like a cookbook - and as with following a cookbook, there is often a need to adjust the ingredients to what is available and the personal preference of the chef or the customers. It is suggested that these would form a good starting point. As you become more fluent with the Types Of Work Model you will develop your own capacity to design work patterns.

Some of the pattern templates provided have a specific context applied so some additional detail can be illustrated. Others are general in nature.

The pattern templates provided are as follows:

1. Designing Something New
2. Decision Making
3. Problem Solving
4. Project Planning And Deployment 36
5. Making Improvements41
6. Annual Planning

Pattern Template

DESIGNING SOMETHING NEW

The process of designing something new is critical to all teams and individuals in organizations. There always needs to be an influx of new ideas in order to meet the needs of internal and external customers and to stay competitive no matter what work you are involved with.

The context for this pattern template is designing a new product or service. This pattern can apply to products or services that are being developed for external use or internal use.

Specific Pattern Sequence

- 1. ADVISING
- 2. INNOVATING
- 3. ADVISING
- 4. DEVELOPING
- 5. MAINTAINING
- 6. LINKING
- 7. PROMOTING

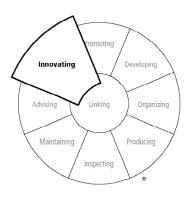
ADVISING

To design a new product or service there must be ideas to work with. These ideas do not simply materialize out of thin air. Ideas are generated from an understanding of the work being done, and understanding is a critical part of the Advising function. In order to begin the pattern for designing something new you need to have an understanding of the work. In the key words and phrases of the Advising function, understanding is defined as the creation of our own picture of what we see. This may come naturally from a constant involvement in the work or you may need to find and ask the right questions about the work to generate this understanding.

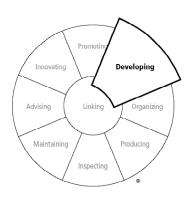
➤ A good method to increase understanding is to have a team session where everyone brings a question about the work and the team attempts to answer it.

This will gather and share information plus provide focus for the next step in the pattern. Once greater understanding of the work emerges, ideas will begin to take shape.









INNOVATING

You now want to investigate the key question from the Innovating function -

What are the possibilities? *"for the new product or service."*

The thinking in the Innovating function is expansive, challenging and accepting. It is a divergent process that does not require conclusions to be made. It is often very helpful to put time aside to focus on this function exclusively so lots of ideas can be generated without the pressure of having to make a decision too fast. A brainstorming session or idea exchange, focused on generating ideas for the new product or service is a good way of doing this.

ADVISING

The Innovating function has produced lots of ideas and the next step in the pattern is to begin the process of narrowing down those ideas to what might actually work. To do this you move back to the key question of the Advising function -

What do we need to know?

In designing a new product or service you would want to gather information from potential customers to see if and how your ideas could best meet their needs. You would also want to know if there were existing products or services available that would affect the assessment of your ideas. You would also want to gather some information about which of your ideas would be most likely to be supported within your organization. After gathering this information you would assess what impact it had regarding the viability of your ideas, to narrow down your list and move to the next step of the pattern.

DEVELOPING

With a short list of options for your new product or service you would now do some critical analysis to determine a response to the key question of the Developing function -

What do we move forward with?

You would want to do a test of the products and services within the team and with potential customers and have these tests be as close to real work situations as possible. You want to be sure you have done enough testing and analysis that you are confident that your new product or service will be successful.

MAINTAINING

This step in the pattern is critical to ensure that the product or service you are going to move forward with is aligned with your customer needs and what the organization expects.

▶ It can be easy to get caught up in the excitement of designing something new and move away from what is really important to the organization or your customers.

This step makes sure you are aligned with, and support the broader direction of the organization. A review of what you plan to do compared against team and individual objectives and the vision and values of the organization is a good way to do this step in the pattern.

Advising Developing Linking Organizing Maintaining Producing

LINKING

Linking in this particular pattern deals with they key question -

We work functions connect?

Keep in mind that all Linking skills as well as this key question need to be continually focused on and developed. For this pattern however it would be important to bring the key question to the forefront since your review in the Maintaining function may have produced the possibility of moving to a few different functions. Whenever you step back from the work you are engaged in, to review what you have done, it is a good time to ask the key question from the Linking function. In this case it is being assumed that the review done in the Maintaining function found good alignment which allows you to move forward immediately with the next step in the pattern.

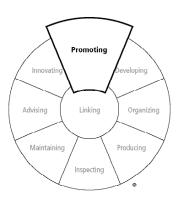


PROMOTING

This part of the pattern brings your product or service out into the open with the intent of getting others to buy-in and support it. Since earlier work functions in this pattern have involved others to provide you with information it makes sense to get back to those people to explain what you want to do and influence them to support or use your new product or service. In addition you need to answer the key question -

Who needs to know about this?

so you include all the necessary stakeholders in your Promoting work. For external stakeholders this may mean advertising in the traditional sense and for internal stakeholders it may mean building and presenting a sound business case that creates a positive image of your product or service.



Key Points For This Pattern

- In designing something new make sure you understand the work and / or the needs of key stakeholders well before generating extensive lists of ideas. Starting with Advising provides the necessary direction to the Innovating function; the next step in this pattern.
- It is easy to get overly enthusiastic with ideas generated in the Innovating part of the pattern. You want this enthusiasm to build on ideas but make sure you are open minded to the information that is gathered about those ideas when you move back to the Advising function again. The assessment of data can be dramatically influenced by what we want it to tell us. Be very objective in adding meaning to the data you collect in this part of the pattern. The same is true for the Developing function.
- Do a good and honest job with the Maintaining function. It will often get left out or glossed over in the rush to get the next best product or service out there. Keep in mind that your efforts are part of a bigger picture that you need to respect and be aware of.
- Virtually all new products and services, or any innovation in general, needs to be promoted. Others will not have the experiences you have had in getting to this point. Be sensitive to what, and how you need to communicate to others, and develop your promoting work with those needs in mind.

Pattern Template

DECISION MAKING

We make hundreds of decisions daily. Decisions direct our every activity. Often we make decisions and have no need to be aware of the process we use in order to create a decision. At other times we need to bring our decision making process out into the open so we can consider its effectiveness. This may allow us to make better decisions or help others to see how we came to the decisions we have made.

Interestingly the pattern for making decisions often follows quite a consistent pathway whether or not the decision is instantaneous or requires extensive time and effort. The pattern does not change much, only the amount of time and the work done in each of the steps.

Understanding the relatively simple pattern behind making decisions is one thing. Understanding how this pattern plays out for you at an individual level is much more complex. Working through this pattern both at an individual level and in the context of the various types of decisions you make enables you to make the best decisions possible no matter what situations you are faced with.

Specific Pattern Sequence

- 1. MAINTAINING
- 2. DEVELOPING
- 3. ADVISING
- 4. DEVELOPING
- 5. MAINTAINING

MAINTAINING

Decisions are based on assumptions that have been formed over time from life experiences. These assumptions create the way you perceive and subsequently relate to the world.

Your life experiences and the assumptions you have created from them form the basis of what is important to you, which is one of the fundamental parts of the Maintaining function.

This is why the pattern for making decisions begins with this function. Decisions are quick and easy when they are aligned with what is important to you. They become more difficult if the decision chal-



lenges what is important to you or the decision causes you to choose between a variety of things that are important.

One of the most valuable things you can do to understand the specifics of your individual decision making pattern is to try and understand what is really important to you at a deep level. If you reflect back over a number of challenging decisions you have made in the past you will likely see some consistent elements to those decisions that will point to the fundamental things that are important to you.



DEVELOPING

Since you have a necessary set of assumptions by which you perceive and relate to the world many of your decisions can be made quickly and with little effort. For example you do not need to take much time to decide if you want to sit down on a chair. Your ready made assumptions of what a chair is for allow you to decide without effort to sit on it.

Due to this you move quickly to the Developing function to test the consequences of your decisions based on previous experiences.

If you can match your present situation with a past situation, and the consequences of the past decision are favorable to you, you can quickly decide in a similar fashion.

It is in the Developing function where the context of the decision making pattern is first considered. Once the context has been considered you evaluate your decision within this context and weigh the consequences appropriately for yourself and the context or situation you are in. Many decisions are made after this step in the pattern. If however you cannot find a past reference point or the context is new in some way you must then gather more information in order to make a decision.



ADVISING

When making a decision you gather and share information to better understand the context in which the decision should be made and to better understand what is important to yourself as an individual as well as the situation you are dealing with.

In most cases in organizations the Advising function in this particular pattern is focused on better understanding the situation or context in which the decision is to be made.

This may require asking questions of those that will be affected by the decision or accessing data that helps you to understand more of the situation.

DEVELOPING

With a better understanding of the specific situation you are dealing with you return to the Developing function and again weigh the consequences of your decision.

This time however you tend to be more deliberate and focused in your considerations since you now have more information to work with.

You may be able to do things like a cost / benefit analysis, value projections, risk analysis or even model some decisions to test their viability. It is tempting to make a decision at this point but one more step is included.

MAINTAINING

Before finally deciding you should always reflect back on the key question from the Maintaining function -

→ "What is really important?".

This check ensures your decision is aligned with what is needed in the organization and as well what is important to you as an individual.

Some Key Points For This Pattern

- Keep in mind that if you are really struggling to make a decision it is probable that you either do not understand the situation well enough and / or you do not understand what is really important to you.
- To avoid getting stuck in the Advising step of this pattern ask yourself the question "Is any more relevant information really going to be found regarding this decision?". If you can honestly say "no" then move on to the next step in the pattern. Sometimes endless information gathering is an excuse to avoid a difficult decision.

For a more in depth look at decision making and how the TMS process can be used to assist with this pattern see:

The Workplace Wizard by Dick McCann Gwent Publishing, Brisbane, 2002 Available from all TMS organizations.





PROBLEM SOLVING

This simple pattern is one that can be used in solving problems without addressing the implementation aspect even though a problem cannot be considered 'solved' until changes are creating the desired results. Once a solution has been found a team will need to turn to a 'productive' pattern (Organizing, Promoting, Producing) to put the changes in place.

Specific Pattern Sequence

- 1. ADVISING
- 2. INNOVATING
- 3. DEVELOPING

ADVISING

Problems are best illustrated and characterized with facts. The team should seek available information that indicates there is a problem - where it is occurring, how often and why. Teams need to transform their theories and hunches into knowledge by obtaining data. If data is difficult to obtain the collective understanding of the team can be used. If there is disagreement and no easy way to clarify with facts, formulate new ideas and test them. Teams can avoid paralysis by analysis by recognizing that data is only readily available for some parameters associated with problems.

Information should also be sought that can help to solve the problem.

Where has the problem been solved before and how? Are there solutions already in place elsewhere?

These are not new ideas but existing ways that have been used by others or in other similar situations.



INNOVATING

Armed with knowledge, teams can direct their attention to generate unique solutions to the problem or customized ways of applying existing solutions to their particular problem. Both approaches will require ingenuity and creativity - the former is wide-open idea generating and the later is a more focused activity.

The output of the Innovating function in this case is alternative ideas that can be developed further.

The ideas should be specified in a way that makes them workable - not too conceptual.

DEVELOPING

Assessment can be undertaken using objective and fact-based analysis and a practical approach involving the testing of the solution. Both approaches will identify support for the effectiveness of proposed solutions and how they need to be modified to enhance effectiveness.

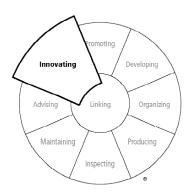
This assessment should test the effectiveness of the solution and identify what will be required to implement it in an effective manner.

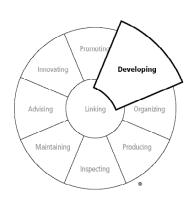
▶ Risks and potential problems need to be identified and contingencies that prevent problems built into the solution where appropriate.

The end point that should be reached following this is a clearly articulated solution that can be implemented by the team or handed off to others for implementation. This will often benefit from the provision of a written specification for the solution.

Some Key Points For This Pattern

- This simple and short pattern is helpful to guide teams to teambased solutions but it does not have an implementation component. This could be straight-forward and routine or require more elaborate planning. Consider moving to other Types of Work that will support more extensive planning if required (Organizing and Producing).
- Developing is important and should not be a step that is missed. Often teams jump to implementation without adequately developing the solution by testing it and problem-proofing.





PROJECT PLANNING AND DEPLOYMENT

Project planning is a critical part of everyone's work. Whether it is a large scale project spanning several months or a small project done in a day we all need to have the skills of project planning to effectively and efficiently do our work.

The context for this pattern template is the project of deploying an extensive leadership development process that incorporates both learning content and extended coaching of application of that content. It is assumed that choices have already been made about what learning content and coaching process will be used and that this project is fully supported from a resource perspective.

Specific Pattern Sequence

- 1. MAINTAINING
- 2. DEVELOPING
- 3. ADVISING
- 4. PROMOTING
- 5. ORGANIZING
- 6. PRODUCING
- 7. INNOVATING
- 8. INSPECTING

MAINTAINING

In planning and deploying a leadership development initiative one of the critical components is to insure that how the initiative is planned and deployed is highly consistent with the intended results you need to achieve.

Creating consistency in the work being done originates with the Maintaining function.

When we review the key words and phrases of the Maintaining function we see that purpose defines the intent of the work, so we begin this pattern by working to clearly understand the intent of the leadership development initiative. A good way to do this is to tell scenario stories about what leadership behavior you would expect to see as a result of this project. Understanding this intent will then inform the development of guidelines and the setting of standards by which



the project will be planned and deployed. This intent will also inform the end results you want to achieve; in this context what leadership behaviors you want to see individuals exhibit.

DEVELOPING

Now that you understand the purpose of the project and have set guidelines and standards regarding how the work will proceed you need to test out some planning options that you think will work well.

▶ In the case of project planning and deployment a good way to do this is to start with the end date of the project and work backwards through the scheduling and logistics to see if that specific planning option is viable.

This exercise will also illustrate plan priorities and critical check points that you will need to be aware of. As a result of this Developing work you will also have to seek out additional information to see if your plan is workable.

Advising Linking Organizing Maintaining Producing Inspecting

ADVISING

The key question in the Advising function is -

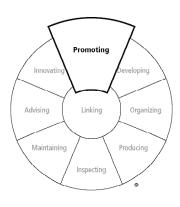
What do we need to know?

For this project you will need to know if the resources required to deploy your plan are available and capable when you need them. This will require gathering information from various areas that will be supplying resources to this project.

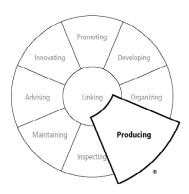
▶ You would need to be detailed and direct in your approach to this information gathering.

In this way, people clearly understand what you are asking of them and can accurately respond at a similar level of detail. You would then assess this information to see how it affects your plan and make adjustments as necessary. Once you are sure your resources match your plan requirements you now need to begin to inform others that will be affected by the project.









PROMOTING

The context that has been defined for this pattern indicates that this project is fully supported from a resource perspective.

The key words and phrases from the Promoting function that inform the work in this step of the pattern are explaining and image making.

You want people to have a decent idea of the logistics of the plan and you want them to see the project in a positive way. This type of promoting does not require high levels of logistical detail but it does require positive energy and enthusiasm. Emails or written material distributed to those affected by the project should emphasize benefits and value and of course be consistent with the intent of the project. At this point you are ready to begin to put things in place so deployment can be enabled.

ORGANIZING

This step in the patterns develops the detail and communicates that detail to others so the plan will flow effectively. The key words and phrases from the Organizing function come to the forefront as the timing and allocation of resources, both financial and people, occur.

With a project of this scope it is advisable to create a visible picture of when things will occur so a project map, such as Gantt chart would be of value.

It is also important to establish systems to track the flow of the work and its effectiveness. In the context of this project this could mean a shared database where those delivering content and doing coaching update their work with the rest of the group at certain intervals. At this point the project moves from the planning stage to the deployment stage.

PRODUCING

In reviewing the definition of the Producing function it indicates that this function has a large component of activating the processes, systems and methods that have been designed to create the needed outputs. Everything done up to this point in the pattern is put into action and utilized. The key question of the Producing function -

* "Are we effectively and consistently delivering what is expected?"

- helps us to keep the standards and guidelines that have been set for the work front and center and enables consistency as this function operates. In this step of the pattern people would be out delivering learning content and coaching people in the effective application of that content. The Producing function also produces large amounts of new information that is valuable in adapting what you are producing to the changing needs of the project.

INNOVATING

If you have organized good systems to feed back the information generated in the Producing function you have the opportunity to innovate based on that information.

➤ Even though the Producing function is directly opposite the Innovating function in the Types of Work Model it is often one of the best sources of information for innovation.

In this specific pattern as the shared database was populated with updates of the work, ideas could also be shared about how to improve it. Learning content might be altered, coaching processes revised and continual improvement enhanced. This innovation would always need to be filtered through the standards and guidelines set earlier to make sure the project was still aligned with the intent of what needs to be accomplished.

INSPECTING

As a project is deployed, the unexpected will always happen. No project can be completely planned and in the context of this fairly large project many unexpected things will likely occur.

>> The Inspecting function ensures that the project is being true to the original purpose and that the results needed are being achieved.

In this case we would want to measure whether the project was being deployed effectively against the standards set by inspecting if we were on budget, on time and using the methods designed. Additionally, you would inspect if the leadership behaviors desired were happening and you might consider using both individual and expanded assessments of behavior to do this.





Key Points For This Pattern

- No project should be started without initially doing your best to understand the projects purpose. It may seem very obvious but there are almost always intentions and purposes that are obscure or hidden. Once you understand the purpose of the project, planning it can become very consistent. Many, many projects are drained of energy because they are planned and deployed in a way that is inconsistent with what they are trying to achieve.
- Even if you have strong support for your project make sure you do the Developing, Advising and Promoting work well. Initial support for a project often comes from higher up in an organization while deployment of the project is dependent on the support of lower levels. Doing the Developing, Advising and Promoting work well will gain support from those groups that you will need to rely on to make the project actually happen.
- There is often pressure to get things moving fast with projects. The Producing function is critically dependent on the effectiveness of the work that has preceded it. Do your best to not let the pressure to produce compromise your planning. Keep in mind that no matter what, you will do the planning, either before or during producing, and it is much more effective when done before.
- Make sure you do your best to design good feedback loops that assist the flow of information from the Producing function into the Innovating function. This allows for constant adaptation to occur and this is critical to effective deployment of a plan.
- Often the review aspect of the Inspecting function is overlooked.
 Taking the time to thoroughly review a project after it is done is one of the best ways of learning from the experiences you have just had.

MAKING IMPROVEMENTS

It may seem vague but 'making improvement' is a continuous and broadly applied pattern in most aspects of work. Situations change, competition stiffens, costs escalate, customer needs shift and a host of other initiating events will make the status quo unacceptable. Accordingly, it is important for a team to develop and refine a pattern of work that makes improvement in an effective and timely manner.

The pattern offered here is applicable to a situation where improvement requires a team's involvement; crossing the functions of several team members at a level of importance that warrants the resources of the team.

Specific Pattern Sequence

- 1. INSPECTING
- 2. MAINTAINING
- 3. ADVISING
- 4. INNOVATING
- 5. DEVELOPING
- 6. ADVISING
- 7. PROMOTING
- 8. ORGANIZING
- 9. PRODUCING

INSPECTING

Inspecting is the work that will reveal a dissonance between what is desired and the current level of performance. Inspecting work requires vigilance.

▶ A process for monitoring important measures should be in place to provide the feedback needed to initiate improvement.

This process should specify the frequency at which measures are compared to goals and standards. It should also identify how the measures will be evaluated and at what level these performance measures will indicate an improvement response is needed.

When Inspecting signals the need for improvement the following pattern will be helpful. This pattern will also be relevant when an improvement has been identified by other means.









MAINTAINING

A confirmation of the purpose behind the perceived need to improve is helpful to verify the correct direction and focus for the improvement. If this is not done then the team can run off improving in the wrong direction.

>> The changes that will come with improvement need to be guided by and aligned with the purpose and relevant standards of the work.

Asking why a change is needed or why is it important to begin this work reveals the purpose behind improvement. This guidance can come in the form of goals and objectives, targets, mission or vision. Bringing these forward and using them to formulate the aim for improvement is a step that is taken early in the pattern.

ADVISING

Information about the current situation is vital - the team must begin with a common understanding of the facts. Each member will bring a different perspective so a factual analysis will help to ground all these perspectives on common facts.

▶ Information is also helpful in directing where new ideas are needed; what is working and what is not.

The challenge with Advising when making improvement is to get the 'right' amount of information since information alone seldom tells you what to do or what changes to make. The information obtained charts the course for innovation by pointing out where new ideas are needed.

Obtain this information by bringing forward relevant data or collecting new data that answers questions that will help to direct the improvement. This can be found in information systems or existing reports - if new information is required it should be collected without bias in a manner that is representative across an appropriate period of time and range of situations.

INNOVATING

Innovating work expands and explores possibilities for change directed by purpose and information.

★ "What changes can we make that will result in improvement?"

- is a question the team needs to answer. To be most effective Innovating work needs to only address that question and not move to other evaluative processes or critique. At the end of the Innovating phase of making improvement there should be several ideas and alternatives.

When doing Innovating work the team will be most effective if they agree to work creatively, building on each other's ideas in a collaborative manner - suspending the voice of judgement. Some teams find it helpful to use formal creativity tools and frameworks; these can break the habit of critical thinking and enable team members to think in new ways.

DEVELOPING

Innovating work produces choices that the team must select from. To make an effective choice requires the identification of an idea or ideas that can be tested and developed further.

Developing requires the team to assess the benefits and risks of each idea and formulate a plan to test the one(s) that seem most promising.

Testing needs to start on a small scale and build confidence and evidence that the idea will create the needed improvement. Too often teams try to 'perfect' an idea on paper before putting it to a real-world test - developing work is often accelerated by trying things out and using the lessons learned from these tests.

Advising Linking Organizing Maintaining Producing Inspecting

ADVISING

Information is needed to verify that the change that has been tested is working. Using the same type of information that indicated that an improvement was needed is appropriate. This information will also be useful as the change is being promoted since it will build support for the idea with factual proof.

Additional information that clarifies how the change will affect related areas in a system should be included. This can be gathered by looking outside the directly affected area or asking people in other areas about the impact of the change.

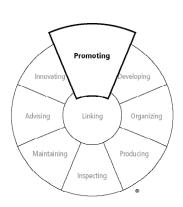


PROMOTING

The people involved in testing changes are always the most enthusiastic and committed to the change. Using information that illustrates how effective a change is in making improvements the team can convince other stakeholders that the change should be widely implemented.

▶ It is much easier to obtain buy-in when the team has tested and developed the ideas.

Use your test results to convey the image of success and consider how it will positively contribute to other's work or outcomes.



Present information and encourage questions when Promoting. Be prepared to answer the questions as fully as possible. The team can be prepared for resistance by critiquing the change and searching for all the benefits including how the change will benefit others.



Inspecting

ORGANIZING

Organizing the implementation of a change requires a consideration of all the tasks that need to be accomplished and the sequence in which they should occur.

This may involve mapping out the change using planning tools such as Gantt charts or PERT.

Resources also need to be allocated in a balanced manner to enable tasks to be completed in a timely manner. There should also be a communication system that provides task status information to all team members.



PRODUCING

The team will produce results by deploying the implementation plan which puts the changes into action. This phase requires action and communication about progress and results.

▶ Each team member needs to be clear about the tasks and deadlines they must meet.

This is often accomplished by producing a written outline for all team members. As the change is implemented any changes that must be made to tasks or deadline need to be shared among the team.

Key Points For This Pattern

- There is often an over-emphasis on the search for information when trying to find the right change to make. Studying situations endlessly rarely results in better improvements. There is much to learn from applying change ideas and testing them on a small scale and this will maintain the team's interest and enthusiasm.
- This pattern may also need to be repeated in several cycles rather than applied in a linear manner, moving from one type of work to the next. While this may seem disorganized it can work very well when the team keeps track of where they are in the process of making improvement.

ANNUAL PLANNING

Annual planning is something just about everyone is involved with as part of their work life. It is a critical part of determining the direction you are going to move in, both individually and organizationally, as well as determining the specific things that need to be done as you move in that direction.

The context for this pattern is planning at the team level although the pattern is equally applicable at the individual level.

Specific Pattern Sequence

- 1. INSPECTING
- 2. ADVISING
- 3. MAINTAINING
- 4. INNOVATING
- 5. PROMOTING
- 6. ORGANIZING

INSPECTING

One of the key words of the Inspecting function is review and it is here that the pattern for annual planning begins.

This review of the work processes and outputs of the team will define where the team stands in relation to where it wants and needs to be.

By determining the present position of the team from an internal perspective you have a starting point to develop plans for the future. You may review target measures against actual performance or need to look at adherence to the values by which the team has set to guide behavior.

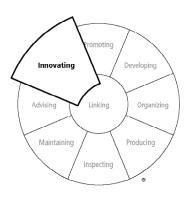


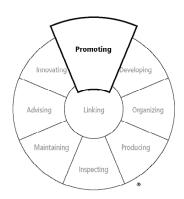
ADVISING

After determining the present position of the team from an internal perspective you would then seek out and assess information that helped the team understand the external environment and how that information could assist the planning work being done. You might want to ask questions of other teams doing similar work or investigate what competitors are doing or what direction the market is moving.









MAINTAINING

With the information from the first two steps of the pattern you would now move to the Maintaining function to determine if the existing direction the team has set for itself is still relevant and important. Asking the key question of the Maintaining function -

What's really important?

- allows you to reflect on the key words and phrases of this function and determine if these things are still viable given the information you now have. You would need to put some time aside to do some good reflection as a team and share honest perceptions before you move on.

INNOVATING

Assuming the direction the team has set for itself is still viable you now want to generate ideas to move in that direction.

These ideas would be influenced by all the work done in the preceding steps of the pattern.

They may involve new ideas for moving forward, making adjustments to existing work processes or keeping certain things the way they are. Building on team members ideas and telling stories of how ideas might play out will help to clarify the work and prepare the team to promote their ideas both internally and externally.

PROMOTING

Annual planning is attempting to create a desired future, and often lots of ideas come forward that hold merit. These ideas will need support to be developed further. The Promoting function in this step of the pattern involves work in explaining ideas and getting buy-in from team members.

▶ Often the best way to promote your ideas is to build a solid business case for the ideas you think will work.

Creating a positive and realistic image of your ideas will help convince others to support your work.

ORGANIZING

Within the context of annual planning it is critical to understand what next steps need to be taken in order to put your plans into action.

Planning is a conceptual activity so in order to begin the work of making your plans become reality you would need to create action plans as part of the planning process.

No planning process should end without everyone having something concrete to do that moves things forward. By attaching the Organizing function to the annual planning process you can ensure your planning becomes reality.

Key Points For This Pattern

- It is very important to be open minded and honest about the things that are found in the Inspecting and Advising steps of this pattern. Sometimes what is discovered is not easy to accept. Guard against distorting this information or the start point for your plans for the future will be inaccurate. By the same token make sure you recognize and celebrate what you discover you do well.
- Make sure you put some good time aside to focus on the Maintaining function in this pattern. Often this reflection is glossed over and the plans that are made become unaligned with what is important to the organization and the team. When this occurs, plans lose the critical energy needed to put them into action. In addition, as the pace of work continues to increase it becomes more important to check what is important to the team against emerging business realities on a regular basis.
- If you begin the pattern for annual planning with the Inspecting function you are making a key link to the deployment of present work, into the planning process. This ensures that planning is always connected to the doing of those plans and does not become a separate, disconnected activity.



Work Pattern	Worksheets	NOTES
and your team t the work that is	work pattern worksheets are intended to assist you o develop effective work patterns that are specific to important to the team and reflect the unique needs of ne team doing it.	
best for the wor	ive team discussion around what pattern would be k you are doing is a great way to start this process and ll on your way to finding alignment and agreement on hould proceed.	
BEGINNING	PATTERNS	
guidelines will a	o create your own specific work patterns the following assist in selecting the appropriate types of work and a manner that will help you and your team.	
of these seem to	he main questions of each of the types of work- do any provide a critical initial focus for the work? These mmarized below.	
	spin the team working wheel and see which of the eem to fit the task based on the key words and phras-	
	ork with the wheel and the additional text in this create a pattern that creates a logical story line that will ork.	
Key Questions	s From The Types Of Work Model	
1. Maintaining	WHAT IS REALLY IMPORTANT?	
2. Advising	WHAT DO WE NEED TO KNOW?	
3. Innovating	WHAT ARE THE POSSIBILITIES?	
4. Promoting	WHO NEEDS TO KNOW ABOUT THIS?	
5. Developing	WHAT DO WE MOVE FORWARD WITH?	
6. Organizing	WHAT NEEDS TO BE IN PLACE TO ENSURE THIS HAPPENS?	
7. Producing	ARE WE EFFECTIVELY AND CONSISTENTLY DELIVERING WHAT IS EXPECTED?	
8. Inspecting	DO WE CONSISTENTLY CHECK TO ENSURE WE ARE ADHERING TO STANDARDS?	
9. Linking	HOW DO THE WORK FUNCTIONS CONNECT?	

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