

TEAM WORKING WHEEL

Bonnie Cooper • Tom Gibbons • Jim Handyside



Team Management Systems Charles Margerison & Dick McCann

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Preface

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 1980s 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

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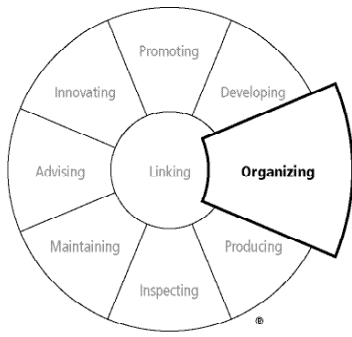
Definitions,
Key Words, Phrases
& Questions
of the
Types of Work Model

KEY WORDS AND PHRASES OF THE DEVELOPING FUNCTION

NOTES

Testing	<i>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.</i>
Analysis	<i>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.</i>
Objective	<i>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.</i>
Converging	<i>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.</i>
Identifying Value	<i>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.</i>
Clarifying Risks	<i>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.</i>
Assessing Capabilities	<i>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.</i>

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.

NOTES

KEY WORDS AND PHRASES OF THE ORGANIZING FUNCTION

NOTES

<p>Structuring</p>	<p><i>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.</i></p>
<p>Scheduling</p>	<p><i>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.</i></p>
<p>Planning</p>	<p><i>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.</i></p>
<p>Mapping</p>	<p><i>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.</i></p>
<p>Establishing Systems</p>	<p><i>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.</i></p>
<p>Resource Management</p>	<p><i>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.</i></p>
<p>Allocating People, Places, Materials</p>	<p><i>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.</i></p>

KEY WORDS AND PHRASES OF THE PRODUCING FUNCTION

NOTES

Implementation	<i>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.</i>
Process	<i>A process is the method by which something is done. Within the Producing function it is important that work processes be highly visible.</i>
Operational	<i>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.</i>
Effective	<i>Effective means that the process being used to produce the necessary output produces it in a consistent manner over time.</i>
Efficient	<i>Efficient means that the process being used to produce the necessary output uses the least amount of resources possible while still being effective.</i>
Activating	<i>Activating converts potential into activity. The Producing function takes the work from the other functions and puts it into action.</i>
Getting It Done	<i>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.</i>
Doing It Well	<i>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.</i>



NOTES

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 INTEGRATING ACTIVITY OF LINKING

NOTES

<p>Awareness</p>	<p><i>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.</i></p>
<p>Communicating</p>	<p><i>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.</i></p>
<p>Connecting</p>	<p><i>Connecting means bringing things or people together in some fashion. By establishing connections, information, ideas and coordination is enhanced and the work progresses smoothly.</i></p>
<p>Flow</p>	<p><i>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.</i></p>
<p>Coordinating Tasks And People</p>	<p><i>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.</i></p>
<p>Big Picture</p>	<p><i>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.</i></p>
<p>Recognizing Patterns</p>	<p><i>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.</i></p>

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

Work Function	Types of Thinking	Possible Actions
Maintaining	<i>Probing And Connected</i>	<ul style="list-style-type: none"> • Setting of standards • Refinement of vision and values • Creating guidelines
Advising	<i>Open, Unbiased And Inquisitive</i>	<ul style="list-style-type: none"> • Market research • Assessing current data • Sharing understanding of work processes
Innovating	<i>Expansive, Challenging And Supportive</i>	<ul style="list-style-type: none"> • Brainstorming • Idea generation in the absence of judgement • Challenging the status quo
Promoting	<i>Adaptable, Visible And Supportive</i>	<ul style="list-style-type: none"> • Presentations • Information meetings and mailings • Building a business case to support ideas
Developing	<i>Objective, Analytical And Decisive</i>	<ul style="list-style-type: none"> • Idea or product test runs • Cost – benefit analysis • Capability assessment
Organizing	<i>Logical, Realistic And Linear</i>	<ul style="list-style-type: none"> • Short term planning • Project mapping and resource allocation • Establishing work processes
Producing	<i>Sequential, Practical And Consistent</i>	<ul style="list-style-type: none"> • Activating work processes • Collecting work process data • Continuous improvement activities
Inspecting	<i>Practical And Detailed</i>	<ul style="list-style-type: none"> • Measuring outputs • Comparing measurements against established standards • Reviewing performance
Linking	<i>Relational And Patterned</i>	<ul style="list-style-type: none"> • 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 27
2. Decision Making 31
3. Problem Solving 34
4. Project Planning And Deployment 36
5. Making Improvements 41
6. Annual Planning 45

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

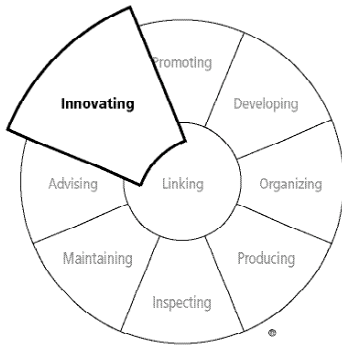
ADVISING

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.

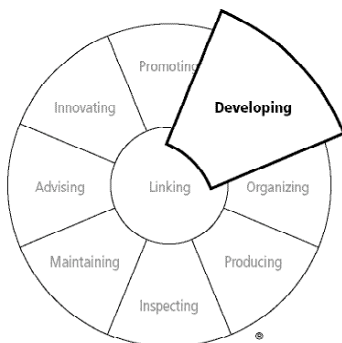


ADVISING

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.

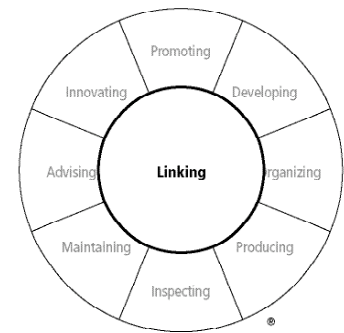


LINKING

Linking in this particular pattern deals with the key question -

- ▶▶ *“How do the 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.

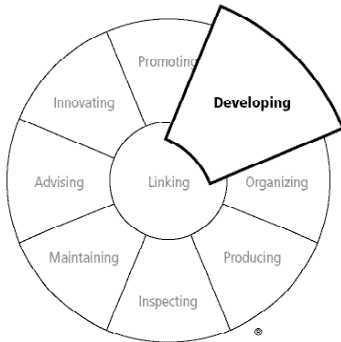
It is in the Developing function where the context of the decision making pattern is first considered. Once the context has been considered you evaluate your decision within this context and weigh the consequences appropriately for yourself and the context or situation you are in. Many decisions are 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?”.*

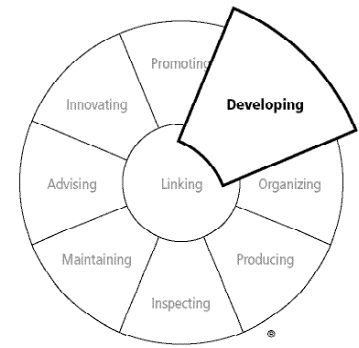
This check ensures your decision is aligned with what is needed in the organization and as well what is important to you as an individual.

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.*



Pattern Template

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.

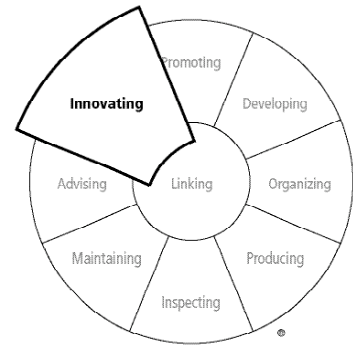


INNOVATING

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.



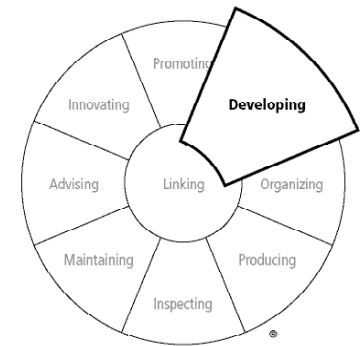
DEVELOPING

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 team-based 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.

Pattern Template

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

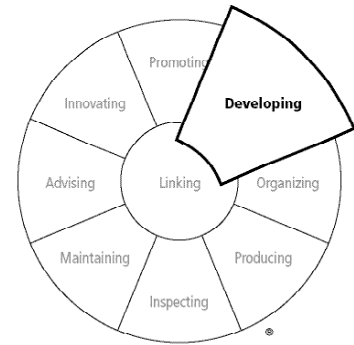
the project will be planned and deployed. This intent will also inform the end results you want to achieve; in this context what leadership behaviors you want to see individuals exhibit.

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

The key question in the Advising function is -

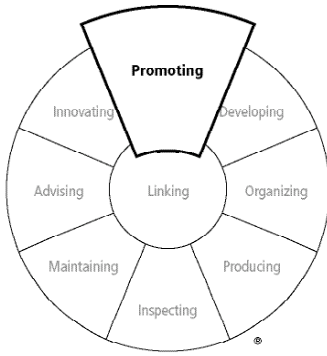
- ▶▶ ***“What do we need to know?”***

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.***

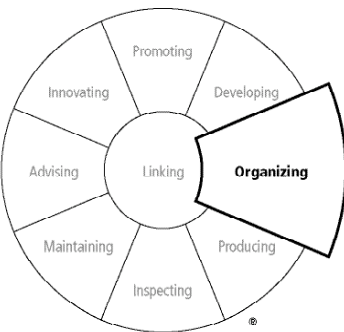
You want people to have a decent idea of the logistics of the plan and you want them to see the project in a positive way. This type of promoting does not require high levels of logistical detail but it does require positive energy and enthusiasm. Emails or written material distributed to those affected 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.

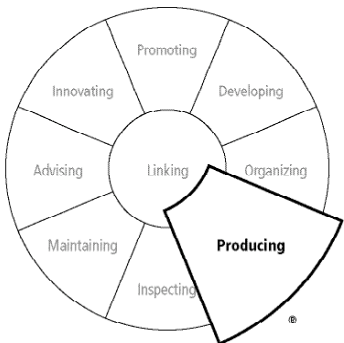


PRODUCING

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



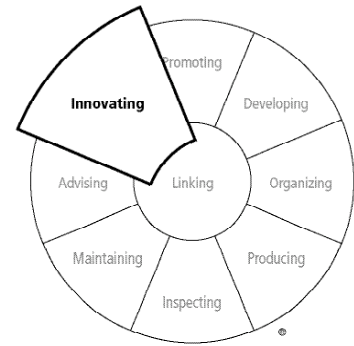
that content. The Producing function also produces large amounts of new information that is valuable in adapting what you are producing to the changing needs of the project.

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 project's 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.

Pattern Template

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.

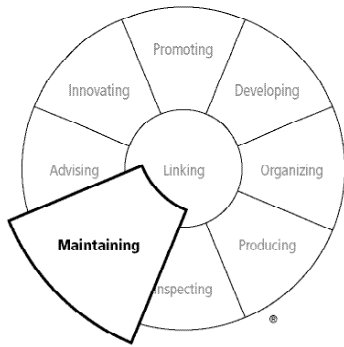


MAINTAINING

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.

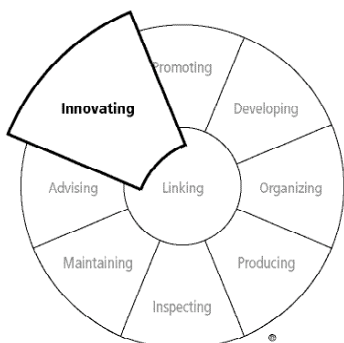


INNOVATING

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.



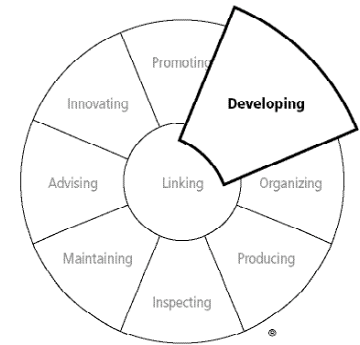
When doing Innovating work the team will be most effective if they agree to work creatively, building on each other's ideas in a collaborative manner - suspending the voice of judgement. Some teams find it helpful to use formal creativity tools and frameworks; these can break the habit of critical thinking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

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.

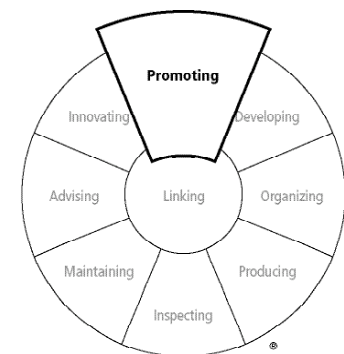


PROMOTING

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.

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

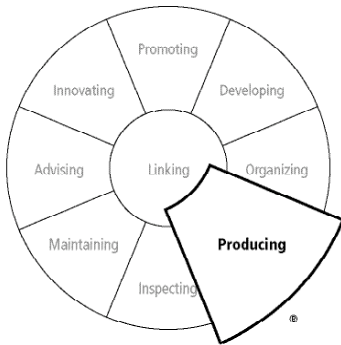
The team will produce results by deploying the implementation plan which puts the changes into action. This phase requires action and communication about progress and results.

- ▶ *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.



Pattern Template

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.

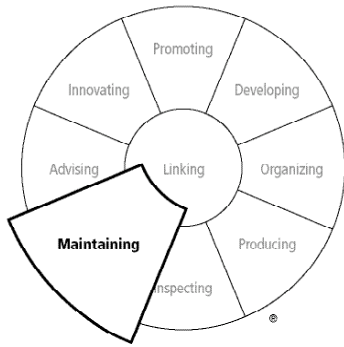
►► *This review of the work processes and outputs of the team will define where the team stands in relation to where it wants and needs to be.*

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.



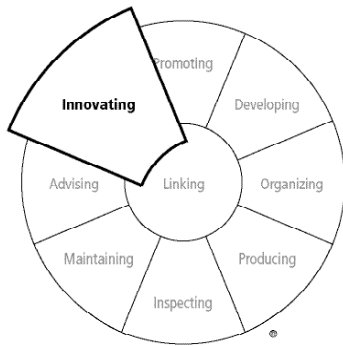


MAINTAINING

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.

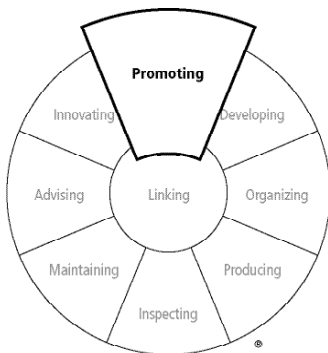


INNOVATING

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.***

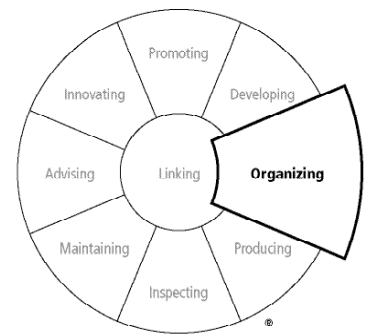
Creating a positive and realistic image of your ideas will help convince others to support your work.

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

Work Pattern Worksheet

Specific Pattern Sequence

- | | |
|----------|-----------|
| 1. _____ | 6. _____ |
| 2. _____ | 7. _____ |
| 3. _____ | 8. _____ |
| 4. _____ | 9. _____ |
| 5. _____ | 10. _____ |

Critical Things For Us To Keep In Mind As We Create And Use This Work Pattern

1.

Specific key words, phrases and questions from this function that are important to this particular work focus.

Specific Activities:

2.

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