Teaming To Achieve

Presented by IMA Leadership Academy

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The Association of
Accountants and
Financial Professionals
in Business

Featured Presenter

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Course Goal and Agenda

Our goal in this course is to explore:

- What teamwork **means,**

- Its importance in **building leadership skills**, and

- How teams contribute to **individual and organizational success**.

- **Introduction**
- **What Makes a Team**
- **Building a Team**
- **Team Collaboration**
- **Close**

Learning Objectives

AFTER THIS SESSION, ATTENDEES WILL BE ABLE TO:

DEFINE | what makes a group a team.

IDENTIFY | characteristics of an effective team and team leader.

DESCRIBE | approaches for building an effective team.

EXPLAIN | the role of collaboration in building an effective team.

What Makes a Team

A Team Is....

Any group of people
organized to work together

INTERDEPENDENTLY &
COOPERATIVELY

to accomplish a purpose or a goal.

GROUPS
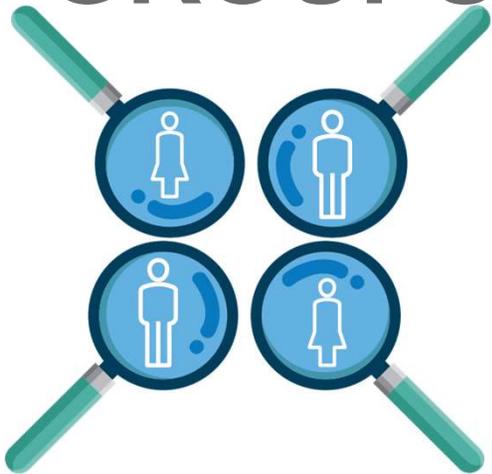
TEAMS

Teams vs. Groups

Teams	Groups

Benefits and Pitfalls of Teaming

BENEFITS

Balanced skill set **1**

Agility **2**

Continuous feedback and improvement **3**

Shared workload **4**

Engagement **5**

Different perspectives **6**

Source: See Bibliography [27]

IMA Management Accounting Competency Framework

Leadership:
- Collaboration, teamwork, and relationship management
- Motivating and inspiring others
- Talent management

Technology & Analytics
- Data governance

Business Acumen & Operations
- Industry-specific knowledge
- Operational knowledge
- Quality management and continuous improvement
- Project management

Poll Question #1

In your experience, what has been the **greatest benefit** of working on a team?

A. Balanced skill set

B. Agility

C. Continuous feedback and improvement

D. Shared workload

E. Engagement

F. Different perspectives

G. No benefit

Poll Question #1 Results

Characteristics of Effective Teams

1. Clearly **defined goals**
2. Clearly **defined roles**
3. Team rules of **engagement**
4. Open **communication**
5. Team **trust**
6. Shared **accountability**
7. Mutual **decision making**
8. A good **leader**
9. Periodic **self-assessment**
10. Shared **fun**

Source: See Bibliography [3]
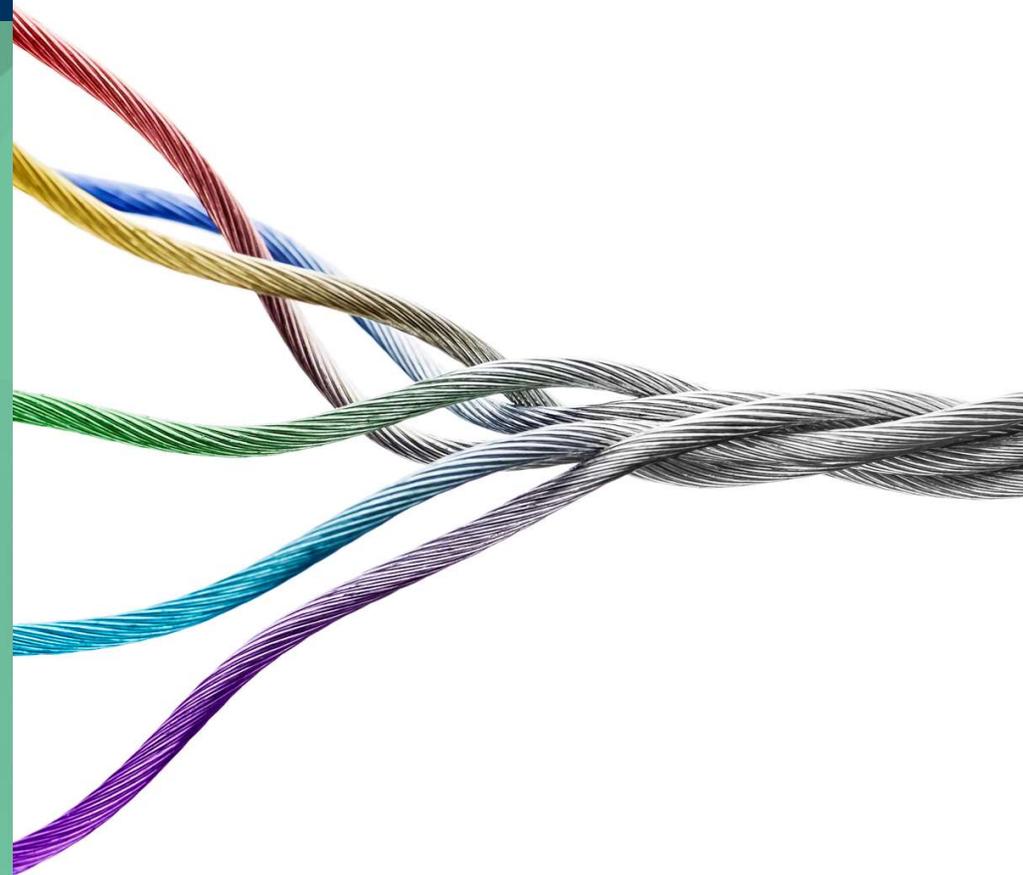
Resilient Teams

1. See **adversity** as an opportunity to improve.
2. Know that **collaboration** is not the same thing as meetings.
3. Build caring, supportive **relationships**.
4. Feel a collective **responsibility** for individual well-being.
5. Develop active **foresight**.

Source: See Bibliography [8,9]

Psychological Safety

"A shared belief held by members of a team that the team is safe for interpersonal risk-taking."

–Amy Edmondson, *The Fearless Organization*

Psychological Safety

PSYCHOLOGICAL SAFETY IS NOT:

- ✖ Sharing without filters.

- ✖ A nice environment where no one gets their feelings hurt.

- ✖ Tolerating everything and everyone.

PSYCHOLOGICAL SAFETY OCCURS WHEN:

- ✓ Everyone can share their thoughts without fear of repercussions.

- ✓ The leader demonstrates psychologically safe behaviors and expects others to do so as well.

- ✓ People feel safe taking calculated risks they have thought about carefully.

Source: See Bibliography [5]

C.A.R.E.

GET TO **PSYCHOLOGICAL SAFETY** WITH:

C LARITY

A UTONOMY

R ELATIONSHIPS

E QUITY

Source: See Bibliography [5]

Poll Question #2

From your experience, which of the following is **most often missing** from a team?

A. Clearly defined goals and roles

B. Team rules of engagement

C. Shared accountability

D. A good leader

E. Shared fun

F. Resilience

G. Psychological safety

Poll Question #2 Results

Building a Team

Tuckman's Stages of Team Development

Source: See Bibliography [13]

Forming

CHARACTERISTICS

- Unclear purpose, roles, and rules of engagement
- Expectations are often unrealistic
- Dependent on authority
- Testing tolerance and leadership

TEAM MEMBERS

- Have a mix of emotions
- May be overly polite
- Want answers
- May be hesitant to participate
- Complain frequently

LEADER BEHAVIORS

- Actively listen and explore issues
- Provide direction and purpose for the team
- Provide feedback on non-productive behaviors
- Allow time for team bonding
- Role model expected behavior
- Use conflict constructively

Storming

CHARACTERISTICS

- Internal team conflict
- Task resistance
- Disruptive group behavior
- Sharp fluctuations in attitudes
- Minimal work accomplished

TEAM MEMBERS

- Challenging
- Competitive
- Defensive
- Polarized

LEADER BEHAVIORS

- Establish a supportive work environment
- Define the rules of engagement
- Keep the group focused
- Role model expected behavior
- Use conflict constructively
- Provide skill-building opportunities to members
- Request and accept feedback

Source: See Bibliography [13]

Norming

CHARACTERISTICS

- Cohesion begins
- Common spirit develops
- Information is freely shared
- More time spent on task

TEAM MEMBERS

- More comfortable with each other
- Begin to trust each other
- Follow the rules of engagement
- Handle conflict constructively
- Feel an increased commitment

LEADER BEHAVIORS

- Facilitate, enable, and empower
- Provide positive reinforcement
- Infuse fun and variety
- Take some chances
- Monitor progress

Performing

CHARACTERISTICS

- Strong team cohesiveness
- Much work accomplished
- Flexibility and shared leadership
- High trust and positivity
- Shared decision making

TEAM MEMBERS

- Behave constructively
- Identify and solve problems
- Take pride in the team
- Collaborate

LEADER BEHAVIORS

- Delegate tasks
- Fend off distractions and disruptions
- Focus on productivity
- Recognize and celebrate team accomplishments
- Acknowledge individual contributions

Adjourning

CHARACTERISTICS:

- Project ends or team members change
- Grieving happens
- Period of change

TEAM MEMBERS:

- Confused about needing to re-form
- Looking for new challenges
- Missing the team and its cohesiveness
- May feel lost or forgotten

LEADER BEHAVIORS:

- Provide a means to remain in contact
- Invite conversations after the project ends
- Help look for new challenges
- Allow for mourning
- Be patient, persistent, and present
- Direct re-forming, if appropriate

Source: See Bibliography [13]

Poll Question #3

When you think of a team you are on now
(or one that you most recently were on), at what
stage of development is that team?

A. Forming

B. Storming

C. Norming

D. Performing

E. Adjourning

F. I really don't know

Poll Question #3 Results

Building a Successful Team

1. Make a plan
  Have a clear map
  Create a shared scoreboard

2. Assemble a project team
  Consider interdepartmental needs
  Create communication practices
  Clearly define expectations
  Map team member skills

3. Create your team's culture
  Agree upon rules of engagement
  Stick to the rules
  Model the behavior

4. Be accountable to the team
  Accountability goes both ways
  Do what you say

5. Have difficult conversations
  Address behaviors, not motivations
  Set expectations for feedback
  Beware the hazards of email

6. Stay engaged

Source: See Bibliography [2,14,29]

Characteristics of an Effective Team Leader

1. Self-awareness
2. Authenticity
3. Knowledge of how to lead
4. The right motivation
5. A desire to be a team leader
6. Resiliency
7. Curiosity
8. High tolerance for stress
9. Honesty

Source: See Bibliography [7]
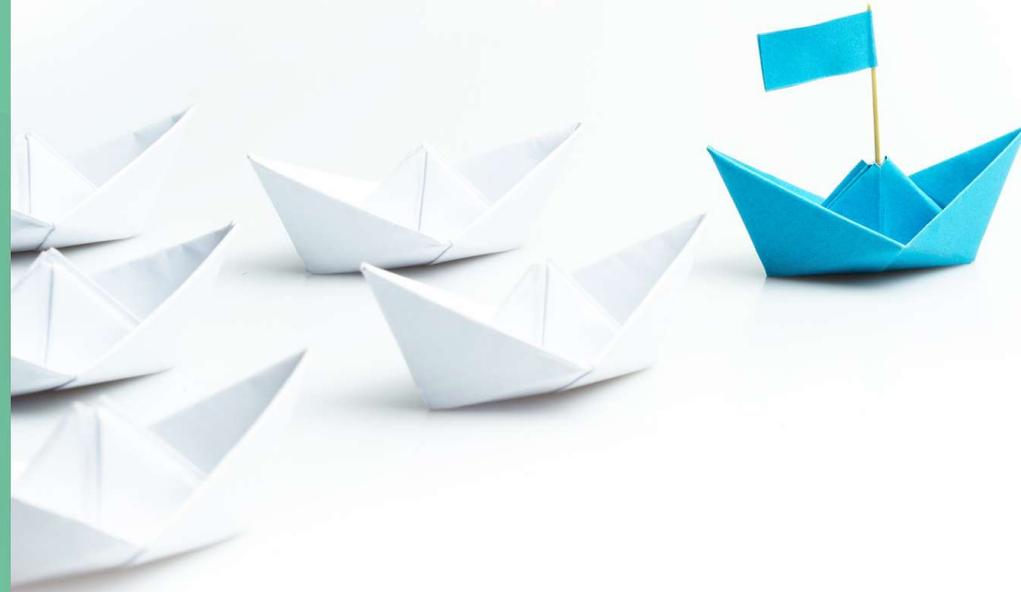
Leading a Multicultural Team

OVERCOME language and cultural barriers

- Choose a common language to use in all team meetings.
- Encourage members to learn a few key phrases in each language.
- Normalize asking someone to repeat themselves.
- Organize informal gatherings to learn about other cultures.
- Consider cultural customs of team members when delegating assignments.

CONSIDER different cultural communication styles

- High context cultures use nonverbal cues often.
- Low context cultures rely on words themselves.
- Multi-active cultures fall in between.

PLAN projects around different time zones

ALLOW prep time whenever the team needs it

BE OPEN to all cultures and their differences

ORGANIZE a cross-cultural training to highlight:

- Minimizing cultural barriers
- Avoiding stereotypes and prejudices
- Appreciating your own and other cultures
- Improving your social skills
- Becoming a better listener
- Focusing on commonalities rather than differences

AVOID stereotypes

PRACTICE empathy

DELIVER honest feedback

Source: See Bibliography [15]

Team Collaboration

Collaboration Is…

Two or more people (or organizations) coming together and contributing their **expertise and work efforts** to complete a

SHARED GOAL,
PROJECT,
OR MISSION

The Importance of Collaboration

- **Helps** us problem solve.

- **Brings** people (and organizations) together.

- **Helps** people learn from each other.

- **Opens** new channels for communication.

- **Boosts** morale.

- **Leads** to higher retention rates.

- **Makes** us more efficient.

Source: See Bibliography [18]

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Elements of a Collaborative Climate

1. Engagement
2. Openness that allows differences to surface
3. Communication ground rules
4. Shared knowledge
5. Transparency
6. Tolerance for uncertainty
7. Expanded views, beliefs, and behaviors
8. Collaborative spaces
9. Purposeful tools

Encouraging Collaboration

1. Teach people to listen, not talk.

Ask expansive questions.

Focus on the listener, not yourself.

Engage in "self-checks."

Become comfortable with silence.

2. Train people to practice empathy.

Expand others' thinking.

Look for the unspoken.

3. Teach people to lead and follow.

Increase self-awareness.

Learn to delegate.

4. Make people more comfortable with feedback.

Discuss feedback aversion openly.

Make feedback direct, specific, and applicable.

Give feedback on feedback.

Add a "plus" to others' ideas.

5. Speak with clarity and avoid abstractions.

6. Train people to have win-win interactions.

Poll Question #4

Which element of collaboration do you **most often find missing** from teams you are on?

A. Openness

B. Empathy

C. Diversity

D. Tolerance for uncertainty

E. Expanded outlooks

F. Communication ground rules

G. Sharing knowledge

Poll Question #4 Results

Close

Review

What Makes a Team

TEAMS VS. GROUPS

BENEFITS AND PITFALLS OF TEAMING

CHARACTERISTICS OF EFFECTIVE TEAMS

RESILIENT TEAMS

PSYCHOLOGICAL SAFETY

Building a Team

TUCKMAN'S STAGES OF TEAM DEVELOPMENT

BUILDING A SUCCESSFUL TEAM

CHARACTERISTICS OF AN EFFECTIVE TEAM LEADER

LEADING A MULTICULTURAL TEAM

Team Collaboration

THE IMPORTANCE OF COLLABORATION

ELEMENTS OF A COLLABORATIVE CULTURE

ENCOURAGING COLLABORATION

Learning Objectives, *revisited*

AFTER THIS SESSION, ATTENDEES WILL BE ABLE TO:

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Action Plan

What **SQUARED** or agreed with what you already knew?

What did you learn today that completed a **CIRCLE** of knowledge?

What did you see from a new **ANGLE**?

What **ACTION** will you take as a result of the training?

Questions and Answers

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Thank you!