The Team Trust Survey Workbook

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Purpose

The purpose of this workbook is to help you and your teammates build and implement a trust development plan together, starting from your discussion of the Team Trust Survey ratings.

The workbook is a place to get ideas on how to foster powerful group discussions and reflect on the contributions you personally want to make. It also serves in part as your personal record of individual and group discoveries, plans and commitments.

The workbook has three parts:

1. Develop agreement about your team's trust level
2. Create an initial trust development plan
3. Employ team exercises

Before starting to use the workbook, have a look through the contents so you can get a feel for how they are laid out. Scan some of the exercises.

The survey document itself contains several sections and the website also includes resources, such as the three video tutorials and FAQ page. All of these resources are inter-related.

There is no one perfect path for team development. Every group is unique! So let any and all of the information in these materials stimulate your own best ideas and judgment. Feel free to actively build on these ideas, innovate, and be creative.

Contents

Develop agreement about your team's trust level

1. Get ready for group discussion 3
2. Plan the meeting 7
3. Just after the rating discussion 12

Create an initial trust development plan

1. Prepare for the team discussion – part 1 15
2. Prepare for the team discussion – part 2
   (Review a sample plan) 19
3. Follow-up after the session – your thoughts 21

Employ team exercises

1. Create team ground rules 22
2. Build trust through ground rules: *when they get broken…* 24
3. Use ground rules to focus personal development 25
4. Create a vision of a high trust team 26
5. Share your gifts with the team 27
6. Assess how decisions are made 28
7. Discuss the undiscussables 29
8. Overcome defensive behavior 31
9. Distribute leadership 33
10. Foster strategic innovation 35
11. Assess team members' leadership 36

Develop Agreement about Your Team's Trust Level

1. Get ready for group discussion

Work through this section *before* meeting with your team, but *after* you've had a chance to download the survey from the website and score it for yourself. You should have an idea of what the five trust levels and six questions areas are all about, as described in the survey document.

Take a look at your score sheet and circle the number that was your highest score. (If your highest scores were very close, feel free to circle more than one number).

Your personal score: +2 +1 0 -1 -2

Now take a look at six questions on your score sheet (the columns). Identify the trust level where you placed your "5" scores. Each column, top to bottom, is arranged from +2 to -2. If you put your "5" in the box at the top of the column, fill in the blank below with +2. If you put your "5" at the next box down, fill in the blank with + 1, and so on.

1. Feedback to team members _____
2. Personal openness _____
3. Leadership and decision-making _____
4. Collaboration _____
5. Dealing with tough issues _____
6. Appreciation and affirmation _____

Put a plus sign (+) to the right of the questions you scored at higher trust levels. Put a minus sign (-) to the right of the questions you scored at lower trust levels.

To what degree do your ratings surprise you? Why?

How accurately do you feel your scores describe the current reality of your team?

The ultimate goal of your team's discussion is to come to a shared view of its trust level. As you get ready for this discussion with your teammates, keep in mind the two most fundamental questions for your group:

Where, in fact, do we agree?
Where, in fact, do we disagree?

Agreement is not necessarily better than disagreement. In fact, it's usually the differences in how people view the team that lead to the greatest insights. Keep in mind that *the goal of comparing scores is first and foremost to understand one another's point of view and experiences.* If one member rates the team at +1 and two others believe the team is at -1 that does not mean something – or *someone* -- is wrong. It only means that team members have different experiences of the group and the team is not yet "calibrated" in its understanding of trust. By openly sharing different points of view and multiple experiences, everyone can begin to understand the sources of trust and mistrust in the group. These are likely to include:

- Specific experiences with current team members
- Experiences from the past, either within the team or within other teams, that color how relationships are viewed now
- Differing views of trust itself, and what high or low trust team relationships look like

Do not try to come to consensus on your overall trust level rating too quickly. The answer to the above situation -- where some members see the group is +1 and others see it as -1 -- is not to agree the group must be at the zero (null) rating. Consensus is not about averages. Rather, team members should talk thoroughly about what the different ratings mean to them and their understanding of the five trust levels. Avoid blame, judgment and second-guessing…of others and of yourself. Work toward respectful openness.

By the way, **Consensus** means a *general* agreement that everyone can live with and support as a basis for common action. It does not mean *perfect* agreement.

Looking at the six questions, it isn't likely you will need to come to consensus as a team on every raw score, but do try to come to agreement on which areas are among the highest, and which are among the lowest in terms of trust. Agreement on the questions can help focus the group later when it comes to developing a shared plan for building trust.

Take a moment now to write out your predictions of what the team conversation will be like for you, based on the questions below.

With whom on the team do you think it likely you will agree in terms of ratings?

With whom do you think it likely you will disagree? Do you believe they will see the team as being at a higher or lower trust level? Why?

For the discussion to be of maximum value, it should be respectful and "psychologically safe." **Safety** is related to but a little different from trust. Trust involves taking risks and voluntarily choosing to be vulnerable. Safety means people feel free to take these risks. High trust groups begin by creating safety. A sense of safety in turn encourages people to take the risks they need to take in order to develop and maintain high trust. A group is only *superficially safe* if people are *saying* it is safe but then *not sharing* their true opinions.

What might be some things you could say or do as part of your group discussion to help the entire team develop a genuinely safe atmosphere to compare ratings, even if trust is not yet fully present?[1]

[1] These definitions of trust and safety draw in part on the work of Professor Amy Edmondson, Harvard Business School, and Consultant Alex Todd.

How can you create safety for those with whom you are likely to disagree?

What can you do to ensure the group is not just *superficially* safe?

What can you do to support your own sense of safety?

Challenge: Create enough safety so that each team member feels free to tell the truth about their ratings and feels comfortable disclosing why. Without this, the group will go slower in improving its overall trust level.

Caution: If people become concerned about too much emotion in this discussion and they do not feel safe enough to proceed, set Ground Rules. Guidelines for how to do this can be found in the Exercises section of this workbook. If the problem is severe and the team is blocked, consider finding a facilitator to help the team.

2. Plan the meeting

This section of the workbook is primarily for those who are responsible for planning or leading a meeting of the team to discuss their scores, but is worthwhile for all team members to read in advance.

Before the session, develop your meeting purpose and flow:

a. Create an objective for the meeting.
b. Create an agenda.
c. Meeting notice and expectations
d. Address logistics.

These elements help create the structure (and safety) within which the team can operate at its best. This is especially important because the topic is trust, a topic that may be more subjective and less concrete than other business matters.

a. Create an objective:

In your own words, describe the central purpose of getting together. This is better stated as an outcome, than a process (e.g., "Agree on our trust level as a team" is better than "Compare our scores on the trust survey.")

Your meeting objective:

b. Propose an agenda:

List the sequence of topics the group will address, and timeframes. Here's one possible example:

- Objective and agenda review (2 minutes)
- Watch "Interpreting Survey Results" video tutorial (15 minutes)
- Set ground rules for our discussion (15 minutes)
- Share overall scores and observations (round robin) (25 minutes)
- Discussion and consensus-building (25 minutes)
- Agree on time and place for follow-up session to develop a trust-building plan (5 minutes)
- Evaluate the session (+'s and –'s, and what we need to do differently next time)

Your agenda:

c. Meeting notice and expectations

Before the meeting, send out a notice to all members of the team stating vital information, including start/stop times, location, the objective and agenda. Also include a statement of expectations about what team members need to have done prior to the session and what they need to bring to it. For instance:

"Everyone, before the meeting, please:

1) *Download the survey from teamtrustsurvey.com website. Print out the entire survey, complete the survey and read through all the pages.*
2) *Download the Survey Workbook from the same website. Read and complete, Section I, 'Developing Agreement about Your Team's Trust Level'*
3) *Read the Exercise in Section III titled, 'Setting Ground rules.'*
4) *(Optional) Create a personal folder or notebook for the survey and workbook.*

Estimated time to prepare: one hour.

Please bring your personal copies of the survey document, including your completed scoresheet, and the workbook to the meeting."

Your preparation expectations:

d. Prepare a helpful score display

In order to share scores, it can useful to have a prepared group score page available that is large enough for everyone to see at once – for example a flipchart page (or more than one page taped together if the group is large). Your page could look something like this:

Sally	Jim	Mei	Jermain	Aaron	
					+2
					+1
					0
					-1
					-2

When, as part of your meeting, team members are ready to share their scores, have them copy their scores for each of the levels from the gray "Row Total" column on their individual survey score sheets. Also have each person circle their highest score.

Another way to share scores is as part of pre-meeting expectations, ask each person to write their name on their completed score sheet and make enough copies for every other member of the team. In round robin fashion, members one at a time can pass out their score sheets and talk about their scores.

e. Address other logistics

Some other elements to consider in advance of the meeting:

Meeting space for the team:	private and comfortable, a good place to talk?
Scheduling:	best time for those involved?
Advance warning:	sufficient time to do the needed prep?
Room set-up:	not cramped; few physical barriers?
Audio/visual:	working before the session starts?
Visual aids:	flipchart to record individual scores?

Your logistics plan:

If you are organizing the meeting, plan to arrive in advance in order to:

1) make sure the room is set up as you like to facilitate conversation
2) greet people and welcome them as they arrive.

3. Just after the rating discussion.

Take a few moments to think about the discussion and record your observations.

From your standpoint, what went well about this session?

What might have gone a little better?

What did you learn?

As a product of the conversation, was the group able to reach consensus on the team's trust level? If not, why not?

What is the plan now to proceed toward consensus?

Note: If a team cannot come to agreement about its overall trust level rating, that may well be a signal that the team is *lower* in trust levels than is supposed. If the group is genuinely "stuck," one option is to agree provisionally by accepting the lower or higher score while working on a trust development plan. The group can revisit this provisional agreement after putting the development plan into place and monitoring improvements.

If the group *did* reach consensus, what was the consensus rating?

Team rating: +2 +1 0 -1 -2

From your own perspective, list below the main reasons why the group decided to rate itself as it did:

If the team discussed the six question areas, which of these areas did the team agree needed strengthening?

1. _____Feedback to team members
2. _____Personal openness
3. _____Leadership and decision-making
4. _____Collaboration
5. _____Dealing with tough issues
6. _____Appreciation and affirmation

From your own perspective, list the reasons below why the group decided to rate itself as it did on the questions.

Do you personally agree with these ratings and conclusions, yes, no or maybe?

What, if any, “unfinished business” do you have with the rating or the rating process?

What is your plan for finishing this “business,” for example, by bringing up the issues in the next meeting or addressing individuals privately?

Create an Initial Trust Development Plan

1. Prepare for the team discussion – part 1 (Each team member completes this preparation on their own)

A great way to prepare for this discussion is by considering how best you can help every other person in the group, and also how best you can help yourself.

A first step is to list each of the other members of the team below by name. In the center column, write a few words that describe the member's participation in team meetings and relationships (e.g., "quiet," "intimidating," "distracted"). In the third column, any changes to behavior each person could make to enhance the level of safety and trust in the team, realizing this is only your personal opinion. If you don't have enough space on the page, attach additional sheets.

Name	Description	Changes

Now do the same exercise for yourself, being thoughtful and thorough.

Description of your behaviors in meetings and relationships	What you could do differently to enhance safety and trust

What are some positive things you believe this team is already good at?

Where are the biggest opportunities for improvement?

Now record your thoughts below about overall changes and initiatives that you believe will help build trust.

There are two kinds of initiatives that typically come up. Both are important; usually neither works alone.

1) Changes that rely on subjective interpretation. For example, what would be some changes in the way people operate together?

    -- more *respectful* toward each other
    -- *tell the truth* at meetings
    -- *support* each person's desire for growth

    These are general **behaviors**. Whether they have happened is a matter of interpretation and agreement and a matter of degree.

2) One time or repeating action steps. For example:

    -- rewrite computer use policy
    -- get staff meeting notes out by 3PM on the day of the meeting
    -- email all associates inviting input to Jermaine on the office move

    These are **action steps**. Whether they have happened is a matter of observation and usually can be answered yes/no; they happened or they did not.

Make a list below of some suggestions to the group you would like to add in *both* areas.

Proposed behaviors

Proposed action steps

2. Prepare for the team discussion—Part 2. Review the following sample team development plan and get ready to talk (Each member completes this preparation on their own)

The plan your team puts does not have to follow any particular format. Your plan will be unique. The team's resources for the discussion are:

1. Your previous rating discussion, including your conversation about the six question areas.
2. The follow-up notes members made after the rating discussion.
3. Members' advance preparation for building the plan, including diagnosis of what each person can do to build safety and trust
4. Members' draft lists of potential behaviors and action steps to share with each other.

Below is an example of a plan.

Sample Trust Development Plan

Team members are: Sally, Jan, Mei, Jermaine, and Aaron. Sally is the manager.

Ratings:

Our overall agreement on our score is 0, with some areas (Feedback, Leadership & Decision-Making, Appreciation, and Collaboration) moving toward +1 and two areas, (Openness and Dealing with Tough Issues) closer to -1.

> We rated ourselves lower in Openness because there is a "dividing line" in the team between Jermain and Aaron, who have been in the team the longest, and Mei and Jan, who are newer. Sally is also new. We rated ourselves lower in Dealing with Tough Issues because, while we don't have a lot of undiscussables per se, we do talk about the dividing line in the background and haven't yet found a good way to resolve some of the awkwardness we feel around it.

There are no outstanding issues from the rating discussion. We are in agreement about our rating. We have decided to do the rating exercise again in six months (together as a team, not individually) to see how things may have changed.

Our desired behaviors include:

- It's okay to ask for help.
- Don't go to the manager instead of talking to one another directly.

- Be respectful of people's time.
- Be respectful of people's personal investment in their work (end complaints about others' lack of commitment – it's not true).
- Be open to discussion of team challenges, mistakes, and problems.
- Actively work to break down the walls.
- Build our strengths and confidence: recognize one another.

When we put these behaviors together, we decided we actually have a vision of a team that's more collaborative and able to change the way it works. We see ourselves as communicating well and addressing issues head on, so there are good things to build on.

Our immediate action steps are:

1. Continue ground rules discussion to better address the "dividing line" issue (Next staff meeting – Mei leads)
2. Post finished ground rules. (Next Tuesday, after the meeting, Mei)
3. Add a few minutes at end of every team meeting for evaluation against the ground rules and report on action steps (Sally, ongoing, beginning next week)
4. Add a fifteen minute shared feedback session once a week on a tough customer relations issue – goal is more openness and better collaboration (Jan will start this, begins next week)
5. Jermaine assists Jan with Jan's reports when his help is needed (ongoing, they work out the schedule)
6. Sally and Aaron meet to clear up differences that have come up following staff performance appraisals.(by next Friday) Aaron and Sally back to the team (within two weeks)
7. Aaron and Jan meet to improve their collaboration. Sally facilitates. (tomorrow) Aaron and Jan report back to the team (next staff meeting).
8. We all meet to develop a trust vision for the team (Exercise #4 in the Workbook) (end of next month – Jim will organize)
9. Check in on how we are doing on our dividing line (same meeting as vision)
10. Revisit "individual assignments" in two months and how we are doing (Sally will organize, On 8/24) – new plan to be developed on that date.

Our individual work to build safety and trust:

Sally: Don't wait for staff meetings to announce decisions that adversely affect some members – warn them in advance. Be more open about reasoning behind decisions

Jim: “Break out of his shell.” Take the risk to put his ideas and observations on the table.

Mei: Ask for help openly rather than criticizing in the background.

Aaron: Communicate concerns more tactfully. Actively invite and be open to feedback about style.

Jermain: Less dominating. Make the offer to help others, rather than waiting to be asked.

3. Follow-up after the session – your thoughts

Take a careful look at the plan the team assembled at its meeting, and evaluate it for yourself. If these steps are completed, will trust be built within the team? Yes, No, Maybe (circle one and explain). If No or maybe, what issues will you take back to the next team meeting or take up with individuals?

What are your assignments from the plan? How do you feel about them? What’s one simple thing you can do to get started?

What loose ends from the survey rating and planning sessions does the team still need to address? Are these undiscussable issues? What will you do personally to create a breakthrough?

Employ Team Exercises

1. Create team ground rules

Ground rules are the most basic exercise related to team trust development. They form an agreement that can be a firm foundation for team trust. In creating your team development plan, you may already have made a good start by sharing their views of the **behaviors** that will most help the group.

You can also develop ground rules from scratch through the following group exercise. Sometimes this is done at the very beginning of a trust building effort. Sometimes it is done later in response to meeting exchanges or tense relationships. Don't be afraid to "stop the action" in a team meeting in order to "tame the interactions" by calling for ground rules. Step back to ask:

"What are we learning here about the ground rules that will most help us build trust as a team?"

Here's the exercise:

Give each person some index cards or ask each person to take out a blank sheet of paper. Post the question listed above on a piece of flipchart paper or on a whiteboard.

Ask each person to write down the five most important ground rules he or she would like to see for the team.

Once everyone has completed that task, ask one person to nominate *one* of the ground rules he/she developed. Write this down on flipchart paper or a whiteboard for the group as a whole. Move to the next person and ask that individual to nominate a different ground rule. Then move the next person, and so on, creating a list of different nominations. Continue in this way until everyone is out of ideas. Number the nominations.

Divide the total number of nominations by 3. Give each person that number of votes. (For example, the group brainstormed 28 total ground rules. Each person now gets 9 votes). Have each person write down on another index card or scrap of paper their choices. They simply need to write down the number of the ground rule, not the words.

Collect the results and post the number of votes for each item. Select the ones that received a majority of votes plus others that the team agrees need to be included.

Finally, discuss what the ground rules mean, clarifying any that people have questions about. If it helps, add the clarifying words, behaviors, or other examples.

Keep In Mind

Trust development efforts are a little different than other team improvement efforts. Ground rules are not present to prevent people from telling the truth to one another or removing conflict. They are there to create safety and vulnerability so that trust can be built. This means they must help people talk directly *to* one another *about* themselves and also *to* one another *about* each other. So, for example, a ground rule such as:

"Separate the person from the problem."

may not be as useful as:

"Address each other with respect"

and a ground rule such as:

"Don't take things personally"

may not be as useful as

"Ask for help and feedback."

Great ground rules enable people to fully voice their truth but to do so in a way that creates safety and respect for the person(s) being addressed – knowing that there may well be some defensiveness. If it helps, think of a close friend who needs to hear something that is likely to be confusing or painful feedback. *Because* you care for the person, you want to be the one to let the person know – as a mark of your friendship and respect. What would be your way of approaching this feedback to your friend?

2. Build trust through ground rules: *when they get broken…*

A natural question is: "what happens if someone breaks one of the rules?" This is a "second level" to the ground rules, since it is inevitable that not every interaction will meet the expectation and vision the rules represent. It will be helpful to create protocols. Ask, "How should we treat interactions where the rules are broken?" Talk about it together, summarize your decisions, and add them to the ground rules themselves. These protocols are an extension of them.

One thing to avoid is creating an atmosphere of "policing" people or freaking out if and when someone's behavior does not match the rules. The ground rules are actually guidelines that are most helpful for *self*-monitoring. Their primary value is as a mirror, not a fence-line. A good way to get started is to give some time at the end of team meetings to simply ask, "How did we do?" and then talk openly about moments that were great examples of following the ground rules and examples of not meeting them to everyone's satisfaction. Broken ground rules are always opportunities to learn. The vital thing is not to punish people but to offer constructive *alternatives*. So, if someone feels a ground rule has been violated, the essential follow-through is to ask, "How could this have happened differently?" Then, get down to specifics:

> "Gilda, when you talked about my assignment, you might not have intended this but I felt I was being called on the carpet. *It would have been helpful to me if you said how you think I could better plan the work*."
>
> "Olivia, you may not have noticed that what you said came across as a back-handed compliment. I think that might be why people seemed to get nervous when you said it. *I want you to know you can be absolutely straight with me. If you were saying you had a problem with my performance, let's talk about that directly."*
>
> "Folks, I know we are trying not to, but we do seem to be going in circles. Let's stop a moment and then *I suggest we begin our 'closing arguments.' If we can't reach consensus, we'll need to fall back on our plan for deciding when we can't agree."*

In higher trust teams, ground rules simply become reference points. It's what happens in the moment that matters, and whether the guidelines are written or not, people freely share their experience of communications and relationships. As part of the feedback, it can be especially helpful to acknowledge others' positive intentions and to maintain an open, positive, sincere tone of voice.

3. Use ground rules to focus personal development

Ground rules can also be useful to guide in helping people begin to learn a cardinal skill of the **+1 trust level: asking for feedback.**

In a group meeting, each person privately selects one of the ground rules to focus on for the next 30 days. They then individually write down the ground rule and their answers to three questions on a separate sheet of blank paper.

> The ground rule I selected is:
>
> 1: Why did I select this particular ground rule?
>
> 2: What one-time or repeating action steps (*not* general behaviors) will I employ to improve in this specific area? (Use the definition of action step on page 17 of this workbook.)
>
> 3: What help will I need to carry out these action steps from others in this room?

Next, each person in turn shares the ground rule he/she has selected and his or her answers to all three of these questions. Finally, the team member asks two additional feedback questions of the other team members:

> From your perspective, is this the right ground rule for me to be working on? If *not*, what would you rather see me working on and why?
>
> Are my action steps really action steps and what else should I add to my list?

At the end of the conversation, the sheets are collected and a copy is given to each member so they can remember who is working on what and provide help. The team also sets a point 30 days out to regroup and discuss progress. At that time, each person goes over what he or she planned to do, what he or she actually did, and what the results were. The person then asks for feedback regarding any changes noticeable to others. This is a time to appreciate the efforts and successes of team members, offer honest feedback (if no positive changes were noticed this should be stated) and discuss how to build on this work in the future, perhaps by continuing the cycle through selection of the same or a new ground rule for individual focus.

4. Create a vision of a high trust team

Another good starting place for team development work, beyond setting ground rules, is to create an inspiring vision of the way members would like the team to be. This focuses everyone on the team's possibilities.

In this exercise, simply encourage people **to tell their stories** about past teams they have been part of, *focusing on trust*. What were some great experiences? What were some lousy ones? What were team members' best, most trusting experiences within any group? Don't limit the discussion to formal work teams; include informal task forces, sports teams, support groups, hobby or church groups, groups of friends, etc. Come at this from as many angles as people have energy for.

One person will need to volunteer to keep notes at the beginning. When the conversation dies down, the note-taker should read back the qualities, experiences, and actions that team members shared. Ask if there are other experiences that come to mind, and if so, add them to the list. The note-taker and one or two other volunteers from the team then meet after the session to go over everything people said and develop a paragraph they believe captures the essence of the discussion. Get to the core thoughts, and develop a theme, such as:

> "A place where we can be ourselves…"
> "A place of dialogue and honesty…"
> "Every one of us a leader…"
> "Synergy: we are more than the sum of our parts…"

Whatever that theme is, flesh it out using words, phrases, and elements from the stories that were shared. The paragraph does not have to be long, but it does need to focus on trust. Next, bring the draft statement back to a whole team discussion to confirm that this is a vision all team members would like to work toward.

Finally – and this is a vital step – discuss together how this vision of trust is likely to affect performance. As a product of the discussion agree on a few additional lines that make a clear connection from high trust to extraordinary performance. Post the vision on the wall as a reminder of where the team wants to go.

An extension of this exercise is to invite others outside the team to read the vision statement. Ask for their feedback and comments, including people who are customers of the team's everyday work or otherwise have a stake in its success, such as employees and managers, other departments, etc.

5. Share your gifts with the team

The purpose of this exercise is to develop sensitivity to the strengths each team member, bringing forward a greater sense of inclusion, safety and appreciation for all members. Because of past experience within the team or in other teams, people can sometimes be anxious about this exercise, with the most common fear that it will in fact result in *negative* feedback. Consequently it is helpful to talk about it first with the group and for the experience to be modeled initially by a volunteer – then confirm members' collective desire to proceed as a team.

1. Ask each person in the team to privately write down a special strength or a gift they feel they bring to the team.

2. One at a time each person comes to the front of the room and explains this gift to the other members. If people aren't clear about the gift, foster some conversation but keep that relatively short, if you can.

3. Each person who is sitting down then has an opportunity to express their appreciation to the person standing for his or her gift and discuss how best that strength can be used to help the team be successful.

4. Once each person has had a chance to present his/her gift and receive feedback, then have a more general discussion. Ask about the experiences of people: did they feel uncomfortable receiving positive feedback or making appreciative statements?

Why or why not? What did group members learn about one another? What did they learn about themselves and the team or organization's culture? Follow this up with a conversation about how people feel this exercise can help build trust within the group.

6. Assess how decisions are made

The process used to make decisions in groups can support or detract from trust. A simple framework for thinking about decisions looks like this:

> 1 = Leader alone – these are decisions that whoever is in the leadership position normally has to decide upon without counsel from others
>
> 2 = Informal input – these are decisions influenced by whoever happens to be present or be asked for their views, but the leader still makes the call.
>
> 3 = Formal input – these are decisions that people expect to participate in and influence through their input, but in the end it's the leader's decision.
>
> 4 = Consensus – these are decisions that are made by a group or team through collaboration. The leader serves as an equal member of the group as it discusses and comes to agreement.
>
> 5 = Delegated – the decision is given to a member or subset of the group or the group as a whole. The leader often retains "veto" rights but otherwise is hands-off.[2]

Ask the team to use this framework to evaluate its decision-making processes. What types of decisions are being made and where do they fall in the framework shown above? What are the challenges of these decisions? Where have they gone right or wrong in the past, and what's behind *that?* Keep in mind:

> A common source of misunderstanding is when 3 type decisions *sound like* they might be 4's. If the team is having this problem, it's best to make sure everyone is fully aware the discussion is for *input* only. Then, when the decision's been made, the reasoning behind it should be clearly explained, including how the specific input was used.
>
> Another problem is 4 type decisions that have no back-up plan. What if the group cannot come to consensus and continues to circle? Before the discussion, agree what will take place if consensus cannot be achieved, such as the decision being delegated to one or two members of the group, try again later, turn the decision into a 3 type, etc.

As part of the analysis, consider the flow of information leading up, during, and after decision-making. Evaluate the importance of *transparency* – what role does it play in fostering or undermining trust within the team and beyond it?

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[2] Based on Kathleen D. Ryan and Daniel K. Oestreich, Driving Fear Out of the Workplace. San Francisco, Jossey-Bass, 1998 (2nd Edition). An entire chapter is devoted to this topic.

7. Discuss the undiscussables

Undiscussables are work-related issues that people do not feel comfortable addressing directly with those who can do something about the problem. Often there has been a great deal of talk about the undiscussables in the background, such as after work, in the "meeting after the meeting," in the hallways or lunch room. They are the classic "tough issues," and include such topics as leader or co-worker performance and work style, unfairness in workloads, ethical or discrimination issues, and many other topics.

Undiscussables are usually emotional for people and interfere with their work, raising concerns about repercussions, hurt feelings, or the futility of discussing them because it's already been tried. Undiscussables cause people to disengage, and they are quite frequently about a person or people within the team. That's what makes them hard to talk about. Because of their emotional nature, it's a good thing to use a facilitator to help create an honest and supportive discussion. That discussion necessarily includes the people the undiscussables are *about*.

In teams where some mistrust may be present, here are some general steps in the process:

a) Identify a range of possible undiscussables to talk about. This can be done anonymously, with people nominating topics on note cards. Often these topics are expressed in an indirect, depersonalized way (Don't be fooled by this – they *are* "hot" topics).

b) Narrow down this list and select the one most important undiscussable to work on, keeping in mind that undiscussables are often linked to one another. It may seem counter-intuitive but select the undiscussable that both *interferes the most* with the work and is *most* sensitive to talk about directly. Trying to select another entry point is dangerous because the "shallow end of the pool" is directly connected to the "deep end," and it can be hard if not impossible to contain a discussion at the shallow end.

c) Before beginning, set clear ground rules for how people will communicate with and treat each other during the discussion of this particular tough topic. Include respect, forgiveness, vulnerability, and other qualities that will make sensitive topics discussable. Use the ground rules to encourage people look at one another, use their names and talk *to* one another; not refer to others in the third person, as if they were not there.

d) Confirm that everyone in the team is willing to go forward with the discussion in a group setting. This is vital. (If not, do not force the issue.

Instead use an intermediary, such as the facilitator, to serve as a supportive go-between for the team.)

e) Divide the discussion into four parts, recording the following on flipcharts or whiteboards for all to see:
   - Facts -- what we all agree are facts
   - Perceptions -- what some but not all of us think are facts; plus opinions, beliefs, theories, suspicions, speculations (this tends to be the longest list)
   - Feelings – name the emotions that people are really experiencing as a result of the problem
   - Action – what we can do together, all of us individually and together as a team, to resolve the problem.

f) Undiscussables rarely are only about one person's actions. There may be a cluster of issues that need to be resolved. Establish an action plan for each issue in the cluster. Make sure the action steps are clear, have dates next to them, and have been assigned to specific people. One of these steps needs to be a follow-up session, including time and place.

g) Before anyone leaves the room, report out any "loose ends:" that is, anything said or done as part of the meeting that might now interfere with relationships, such as hurt feelings. Work together to support everyone and clear up any misunderstandings. If needed, arrange time for people to talk with each other after the session to repair relationships or conclude unfinished business with one another.

h) Follow-up as planned in the action steps to gauge progress, encourage and support people, and reinvent or add to plans as necessary.

As you can see from this list, discussing the undiscussables is not a light-weight exercise. What you and everyone can do to help:

> Assume others' good intentions; offer grace and compassion; refuse to get hooked into speculation about motives or character. Instead, focus on yourself, asking directly for feedback about your own role in the problems – and taking responsibility for sharing your truth.

Very high trust teams have incorporated all of these skills into their *everyday* interactions. That's why they never seem to have undiscussables. They believe in and appreciate one another, even when conflicts and sensitive issues arise.

8. Overcome defensive behavior

Defensive behavior is any conduct, thinking process or feeling that protects people from meaningful engagement with one another. Conflict is natural within teams – it occurs whenever people are interdependent in some way – but it can become dysfunctional when laced with mistrust and blame. Conflict shifts toward more constructive ends when it acts as a stimulant to inquiry, appreciation, and creative synergy.

Everyone has a defensive style made up of two components: the typical way a person displays defensiveness (such as shutting down or arguing), and the things about a person that he or she becomes most defensive about (such as intelligence, integrity, or other personal talents and capabilities).

This exercise is based on the paper, "Following SELF: How Leaders Can Stop Defending and Start Living Their Higher Cause." The paper's download link is:

http://www.unfoldingleadership.com/downloads/FollowingSelf.pdf

1. One or two members of the team volunteer as exercise coordinators. They read the paper in advance, picking out at least one of the exercises described in the paper for the entire group to work through. It is recommended that if a single exercise is selected, it be the lists of good and bad leadership traits plus the two "wheel diagrams" describing defensive styles. Team members are asked to complete these in advance.

2. Team members meet to discuss their results. In addition to their other exercises, they should create a wall chart similar to the one in Appendix 2 (page 56) of the paper. Using the chart, they then discuss specific occasions when defensive behaviors were observed in action within their team. For example, how has defensive behavior influenced the following?

    a. When members tried to engage in mutual problem-solving
    b. When it was important to talk about mistakes of individuals or the team as a whole
    c. When members needed to make and execute decisions together
    d. When team members and the leader attempted to give or receive feedback with each other
    e. When one-time or longer-term conflicts among certain members interfered with the group's productivity.

3. As part of the discussion of #2, above, team members should voluntarily identify themselves as having operated defensively. The volunteers then

openly ask for the group's advice on what they might have said or done differently. Others should provide constructive counsel including concrete alternatives on what to do and say (e.g., "You could have apologized right away, rather than hedging your language and pulling your chair out of the group").

4. Finally, as a whole group, make specific agreements with each other about what to do when defensive behavior occurs during interactions. Ask everyone how they would each like to be reminded of their personal strengths (their "light sides") and what would most help most if "hijacked" and displaying defensive behavior. Make sure each team member knows what every other member needs via written notes of the discussion or short cue phrases added directly to the team diagram – which can continue to be displayed during team meetings.

9. Distribute leadership

When teams reach higher trust levels they will naturally want to expand their sense of autonomy and mastery. This can be done by transferring responsibilities that once belonged to the formal manager or leader of the group to the team itself. This is often a process of gradual delegation accompanied by learning, and is traditional to the development of self-organized and self-managed teams.

1. The designated or formal leader and the group work together to describe and define the current responsibilities of the leader. These can embrace technical, administrative, and interpersonal leadership responsibilities, from relatively simpler to more complex and sensitive tasks as:

    Defining and organizing how work will be done and flow through the team
    Evaluating the performance of individuals and setting pay
    Coordinating work with other organizational units
    Collaborating with other teams strategically
    Leadership for process improvement
    Creating new products or services
    Budget preparation, purchases, and other financial decision-making
    Customer services and negotiations
    Communications within and outside the team
    Measurement of outcomes

2. Once the list has been made, the group should put it in order of how challenging these tasks will be to delegate to the team as a whole. For example, the group can ask itself which of these tasks will it be most difficult to absorb…

    For political reasons?
    Because members don't yet know how to do it?
    Because it is a sensitive responsibility likely to involve conflict?
    Because the formal leader may have a hard time letting it go?
    Because it will require support from other teams or organizational leaders?
    Because it involves a change in culture or formal rules of the larger organization?

3. When the list has been put in order from easiest to delegate to most difficult, the team can then begin planning for transfer of the *easiest* task first. This is accomplished by developing a vision of how this single task can be handled. For example, taking a relatively straightforward delegation, such as "managing staff meetings," the team can ask itself questions about how the transfer to team leadership will actually occur.

What aspects of this responsibility would go to one member of the team?
What aspects might be distributed to each member?
Would handling this responsibility have aspects that could be rotated among us? How would a rotation plan work?
How will we measure whether we are managing our meetings effectively?
What do we need to learn in order to manage our meetings well?
What specific steps and assignments do we need to take on in order to transfer all related tasks and responsibilities?
How soon should this responsibility be transferred in total?
What role, if any, will the leader play in training? What role will the leader continue to play over time related to this responsibility?

4. A written summary of overall team agreements and specific action steps should be drawn up for each task as it is transferred. These can be incorporated into an monthly or longer workplan for the team as it gradually absorbs increasingly challenging tasks.

5. As the work of the team continues incorporating increasingly complex and sensitive leadership tasks, the team and leader will also need to set aside time to discuss the leader's evolving role. How would he/she *like* to relate to the team? What strategic counsel and guidance from the leader does the team enjoy and want to continue? What linkages and expectations remain essential? How will the leader re-characterize his or her organizational role? How best can the leader stay in tune with the team's challenges and in touch with its activities without becoming intrusive or directive? How can communications stay open, clear, and trust-based?

Dialogues of this kind reduce ambiguity and ultimately build toward a team mentoring role rather than a managing one.

10. Foster strategic innovation

The goal of this exercise is to build an environment that supports team innovation. For some, it may seem counter-intuitive in approach since the aim is to reduce competition among team members in favor of collaborative "builds." Here's how it works:

1. Each team member develops an idea on his or her own for a change in the team's work within a stipulated deadline (say a week). This could be an idea for a new product or process, an efficiency improvement, restructuring jobs or the whole organization, a new initiative to market the team's work or improve relationships – the sky is the limit and all ideas are welcome. Each idea should be summarized on a page or two, describing:

    - the nature of the innovation
    - its relationship to the strategic goals of the team
    - the potential positive impact of implementing the idea
    - challenges of implementation and how to overcome them
    - resources needed

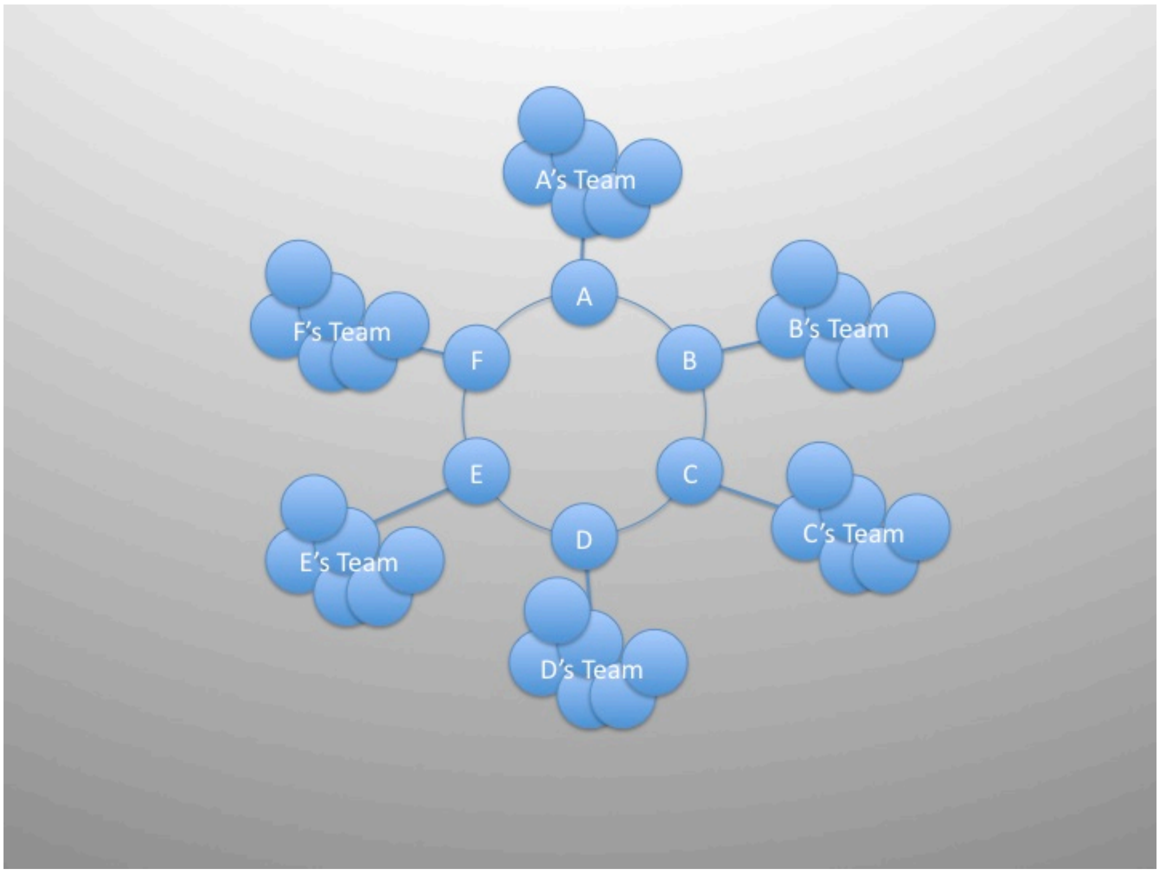
2. All ideas are shared with all members. At a team meeting, ideas are discussed one at a time, with each idea presenter receiving positive, appreciative feedback (what's great about the idea) and suggestions and "nudges" on how to make the idea stronger, more effective, and more "implementable." Critical or undermining comments are voluntarily prohibited. If any sneak into the conversation, they are called out as such but they are also then carefully examined for any kernels of wisdom they contain. The goal is to help each person extend and amplify his or her concept and *to build bridges among the differing ideas being shared.* This is particularly important for any ideas that seem mutually exclusive (if the innovation is implemented, it means other innovations cannot).

3. At the finish of this session, team members pair up or form trios to further develop each idea based on the feedback. At this point the ideas may change dramatically in favor of combining innovations. And the pairs/trios may also propose additional new ideas they develop collaboratively.

4. The larger team again reassembles to review the total range of ideas, and looks for linkages and any additional ways ideas might be combined. The team then picks through consensus *as many as the innovations as the group would like* to actually move into implementation. This is not a contest, but a collaboration employing *all* the ideas that the team has energy to execute. If there is too little energy to execute an idea, it is bypassed in favor of those innovations people are most excited to try out.

11. Assess team members' leadership

This exercise helps teams gain important feedback for personal and team development. It works especially well with teams where each member has reports, but can also be easily adapted to situations where, say, each member of a team has a different set of customers.



1. Members of the team (A, B, C, D, E) together develop 5-10 criteria for effective leadership by anybody who is part of the team. This could include technical leadership, but also other less tangible aspects of leadership the group decides upon, such as vision, constructive management of conflicts, authenticity, and capacity to inspire. The team writes a one or two sentence description of each of these qualities.

2. Each member polls the people who report to her or him, asking for feedback in each of the criterion areas. For example, A can meet with A's whole team at the same time to get this feedback, or meet with members individually. All members meet with their teams within a given timeframe (say two weeks or a month). Based on the feedback received, each member develops a one- or two-page list of key feedback received,

strengths and areas for improvement, with a few ideas also for action steps leading to personal growth and development based on this data.

3. A, B, C, D, E assemble and share their learning from their teams of reports one at a time. As each person does this, the other members of the A, B, C, D, E team provide additional feedback from their own experience of their team mate, and also make additional action step suggestions for personal growth and development.

4. Each person refines his or her plan and forwards a copy to every other member of the team. He or she then also meets with his or her reports to share personal learning and commitments for personal growth based on the combined feedback from them and from peers.

5. Team members get back together to share the results of their meetings with reports. They set a follow-up date (a month to three months out) and follow up to review mutual progress on the personal growth commitments team members have made. At this time, the group can also decide whether this process should be repeated in the future.

A variation of this process is for each team member to not only ask for feedback from their own teams about themselves, but also to ask for feedback about leadership of the A, B, C, D, E team as a whole. For example, does the team seem to operate cohesively? Does the team seem to have a shared vision? How is decision-making by the team perceived? Do some members seem to have more power than others or dominate the team's actions? Are their conflicts and how are those viewed? How does the team as a whole fare on each of the criterion listed for individuals? And what's behind that?

Then, when team members meet at Step 3, they also bring this data forward for consideration. This, in turn, causes the group to assemble a development plan for the team as a whole, along with their individual plans. Finally, a session with the team and all reports of all members is called to go over both the individual and the group development plans. This gives everyone a chance to participate in a total review of the A, B, C, D, E team's leadership and create open dialogue, modeling a +1 culture within the group as a whole. And, just as in the five step approach shown above, the large group can discuss how best to follow-up this session, perhaps by expanding the approach to gathering feedback from other teams, departments, from customers or other stakeholders, or expanding the effort through the reporting teams themselves if they, too, have reports.