TEAM EFFECTIVENESS PROFILE

Sample Company

Management Team

July 27, 2021

△A ASSESSING *in ACTION*

TEP Overview

Team Effectiveness Profile Overview

The Team Effectiveness Profile (TEP) provides insights about how a team functions, promotes the team's self-awareness, is developmental for team members, and lays the foundation for team action items for improvement.

The TEP is suitable for complex teams or groups. Complex teams meet, discuss issues, and make decisions. They do real work to achieve a common goal and get things done. Team members are interdependent. Examples of complex teams are management teams, cross-functional teams, functional teams, operational teams, project teams, and virtual teams. Team size does not matter although we typically see teams in the 5 to 15 range. The TEP is useful in the private sector, public sector, or non-profits. The TEP works equally well for cross-cultural and global teams.

The TEP is useful for teams are varying stages of development. High performing teams can find new ways to improve. Good teams can become great teams. Average teams can figure out how to get unstuck. For dysfunctional team, the TEP can provide a roadmap to improve.
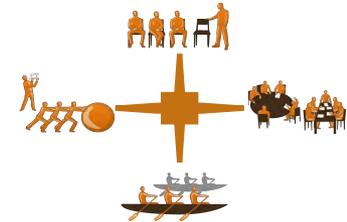
Overview of the TEP Model

We developed the TEP model and items over many years, analyzing some 5,000 interviews where asked team members what was working and not working about their team. We did an exhaustive review of the academic research in team effectiveness, and we fine-tuned our model. We then put it into the field for use with our clients. Once it met our high standards, we introduced the TEP to a global audience.

The online team assessment includes 36 questions and takes six minutes on average to complete. The TEP report is organized around five drivers of team effectiveness:

- Key Factors
- Team Assembly
- Team Alignment
- Meeting Processes
- Team Dynamics

Defining the Team Effectiveness Drivers

Key Factors
Complex team skill sets that have a disproportionate impact on team effectiveness
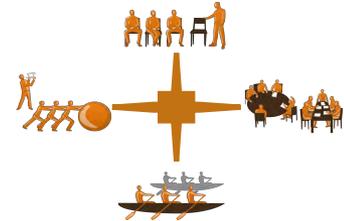
Team Assembly
Setting the team up for success with the right size, roles, and structural supports

Team Alignment
Ensuring the team is aligned around purpose, strategy, goals, and commitment

Meeting Processes
Designing procedures that pave the way for effective and efficient meetings

Team Dynamics
Improving group and interpersonal dynamics impacting trust, dialogue, and decisions

Team Assessment

Team Scorecard

Overall Team Score = 4.29 out of 5.00

4.33	4.17	4.40	3.93	4.22
Key Factors	Team Assembly	Team Alignment	Meeting Processes	Team Dynamics
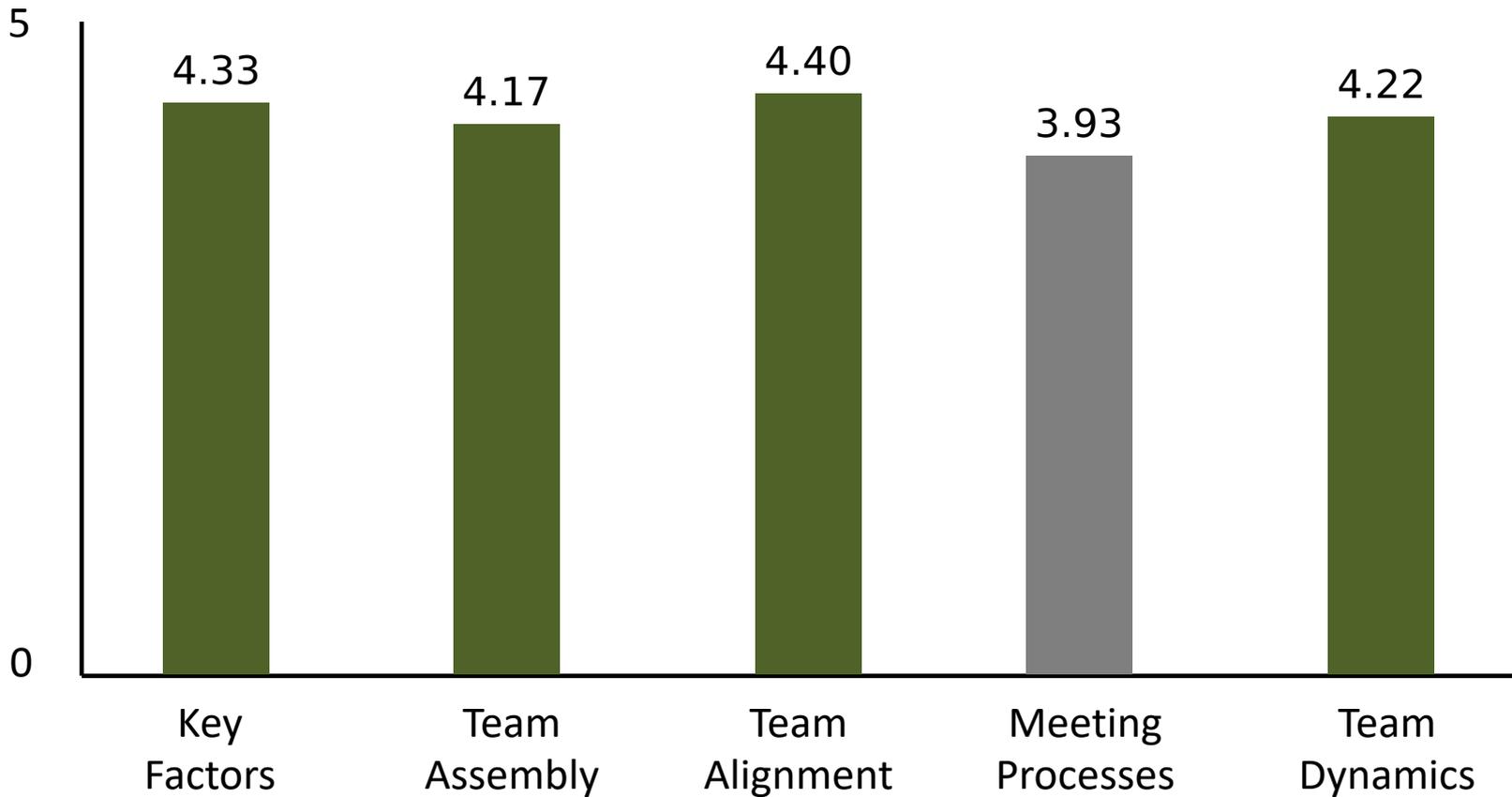
Note: Scores are on a 100-point scale. Overall team score is based on a proprietary algorithm.

What is working

Highest Scoring Items	Average Score	Category	Percent Agree	Percent Disagree
We support each other.	4.8	Interpersonal Dynamics	100%	0%
We cooperate and collaborate well with each other.	4.8	Interpersonal Dynamics	100%	0%
We treat each other with respect.	4.8	Interpersonal Dynamics	100%	0%
The purpose of the team is clear.	4.8	Team Assembly	100%	0%
We are unified around a clear and compelling vision.	4.8	Team Alignment	100%	0%
We put the team first above individual agendas.	4.8	Team Alignment	100%	0%
We meet often enough to do the work of this team.	4.6	Meeting Processes	100%	0%
We make good decisions.	4.6	Key Factors	100%	0%

Note 1: Scores are on a 5-point scale (1 is Strongly Disagree and 5 is Strongly Agree)
Note 2: The Average Score includes all Team Members and Team Leader
Note 3: Percent Agree is based on scores of "4" or "5"; Percent Disagree is based on scores of "1" or "2"
Note 4: Highest scores are the top eight average scores across all 36 questions
Note 5: More than eight items will show if there are ties

What can be improved

Highest Scoring Items	Average Score	Category	Percent Agree	Percent Disagree
We give each other behavioral feedback.	3.4	Interpersonal Dynamics	60%	20%
We use agendas skillfully for our meetings on the most important things.	3.4	Meeting Processes	60%	20%
We take risks and are vulnerable with each other.	3.6	Interpersonal Dynamics	40%	0%
We assign someone to guide and manage segments of meetings.	3.8	Meeting Processes	60%	20%
Incentives and goals promote teamwork.	3.8	Team Assembly	80%	0%
We are skilled at confronting and improving dysfunctional group dynamics.	3.8	Group Dynamics	80%	0%
We effectively track action items and decisions made.	3.8	Meeting Processes	80%	0%
We use pre-read materials for important topics.	4.0	Meeting Processes	80%	0%

*Note 1: Scores are on a 5-point scale (1 is Strongly Disagree and 5 is Strongly Agree)*
Note 2: The Team Average includes all Team Members and Team Leader
Note 3: Percent Agree is based on scores of "4" or "5"; Percent Disagree is based on scores of "1" or "2"
Note 4: Lowest scores are the bottom five average scores across all 36 questions
Note 5: More than five items will show if there are ties

Key Factors Dashboard

	Team Average	Percent Agree	Percent Disagree	Strongly Disagree ··· Strongly Agree
We make good decisions.	4.6	100%	0%	1 2 3 4 5
Meetings tend to be effective.	4.6	100%	0%	1 2 3 4 5
We are a high performing team.	4.4	100%	0%	1 2 3 4 5
We are agile and respond to change well.	4.2	100%	0%	1 2 3 4 5
Meetings tend to be efficient.	4.2	80%	0%	1 2 3 4 5
There is a high degree of trust and psychological safety on this team.	4.0	80%	0%	GAP 1 2 3 4 5

Note 1: Scores are on a 5-point scale (1 is Strongly Disagree and 5 is Strongly Agree)
Note 2: The Team Average includes all Team Members and Team Leader; Team Member Average Score excludes the Team Leader score
Note 3: Percent Agree is based on scores of "4" or "5"; Percent Disagree is based on scores of "1" or "2"

Team Assembly Dashboard

	Team Average	Percent Agree	Percent Disagree	Strongly Disagree ... Strongly Agree
The purpose of the team is clear.	4.8	100%	0%	1 2 3 4 5
Our team is diverse.	4.4	80%	0%	1 2 3 4 5
Roles and responsibilities are clearly defined.	4.0	80%	0%	1 2 3 4 5
Our team is the right size and consists of the right roles.	4.0	80%	0%	1 2 3 4 5
We have the resources we need to do our work as a team.	4.0	80%	0%	1 2 3 4 5
Incentives and goals promote teamwork.	3.8	80%	0%	1 2 3 4 5

Note 1: Scores are on a 5-point scale (1 is Strongly Disagree and 5 is Strongly Agree)
Note 2: The Team Average includes all Team Members and Team Leader; Team Member Average Score excludes the Team Leader score
Note 3: Percent Agree is based on scores of "4" or "5"; Percent Disagree is based on scores of "1" or "2"

Team Alignment Dashboard

	Highest Scoring items out of all TEP items
	Lowest Scoring items out of all TEP items

Team Leader Score	Team Member Average Score
GAP	Star denotes a gap of 1.0 or greater between the Team Leader score and the Team Member Average Score

	Team Average	Percent Agree	Percent Disagree	Strongly Disagree ... Strongly Agree
We are unified around a clear and compelling vision.	4.8	100%	0%	1 2 3 4 5
We put the team first above individual agendas.	4.8	100%	0%	1 2 3 4 5
We show commitment to decisions made.	4.4	100%	0%	1 2 3 4 5
We are aligned on the right short-term priorities and goals.	4.2	100%	0%	1 2 3 4 5
We understand and are aligned about our strategy.	4.2	100%	0%	1 2 3 4 5
The work this team should do or not do is clear.	4.0	100%	0%	1 2 3 4 5

Note 1: Scores are on a 5-point scale (1 is Strongly Disagree and 5 is Strongly Agree)
Note 2: The Team Average includes all Team Members and Team Leader; Team Member Average Score excludes the Team Leader score
Note 3: Percent Agree is based on scores of "4" or "5"; Percent Disagree is based on scores of "1" or "2"

Meeting Processes Dashboard

	Team Average	Percent Agree	Percent Disagree	Strongly Disagree Strongly Agree
We meet often enough to do the work of this team.	4.6	100%	0%	1 2 3 4 5
We have an effective decision-making process.	4.0	80%	20%	1 2 3 4 5
We use pre-read materials for important topics.	4.0	80%	0%	GAP ▶ 1 2 3 4 5
We effectively track action items and decisions made.	3.8	80%	0%	1 2 3 4 5
We assign someone to guide and manage segments of meetings.	3.8	60%	20%	GAP ▶ 1 2 3 4 5
We use agendas skillfully for our meetings on the most important things.	3.4	60%	20%	1 2 3 4 5

Note 1: Scores are on a 5-point scale (1 is Strongly Disagree and 5 is Strongly Agree)
Note 2: The Team Average includes all Team Members and Team Leader; Team Member Average Score excludes the Team Leader score
Note 3: Percent Agree is based on scores of "4" or "5"; Percent Disagree is based on scores of "1" or "2"

Team Dynamics Dashboard

Group Dynamics

	Team Average	Percent Agree	Percent Disagree	Strongly Disagree → Strongly Agree
It is easy to express contrary views in meetings.	4.4	100%	0%	▼ near 4.3, Team Leader at 5
We challenge each other in meetings.	4.4	100%	0%	▼ near 4.3, Team Leader at 5
We are free of conflicts that are unproductive and damaging to the group dynamic.	4.4	100%	0%	▼ near 4.3, Team Leader at 5
We reflect upon and learn from our mistakes.	4.0	80%	0%	GAP ▼ near 3.8, Team Leader at 5
Everyone engages enough in conversations, and no one is sidelined.	4.0	80%	0%	GAP ▼ near 4.2, Team Leader at 3
We are skilled at confronting and improving dysfunctional group dynamics.	3.8	80%	0%	▼ near 3.8, Team Leader at 4

Note 1: Scores are on a 5-point scale (1 is Strongly Disagree and 5 is Strongly Agree)
Note 2: The Team Average includes all Team Members and Team Leader; Team Member Average Score excludes the Team Leader score
Note 3: Percent Agree is based on scores of "4" or "5"; Percent Disagree is based on scores of "1" or "2"

Team Dynamics Dashboard

Interpersonal Dynamics

	Team Average	Percent Agree	Percent Disagree	Strongly Disagree → Strongly Agree
We cooperate and collaborate well with each other.	4.8	100%	0%	▼ near 5
We support each other.	4.8	100%	0%	▼ near 5
We treat each other with respect.	4.8	100%	0%	▼ near 5
We hold each other accountable for keeping commitments.	4.2	80%	0%	▼ at 4, leader at 5
We take risks and are vulnerable with each other.	3.6	40%	0%	GAP ▼ at 3.5, leader at 5
We give each other behavioral feedback.	3.4	60%	20%	▼ at 3.3, leader near 4
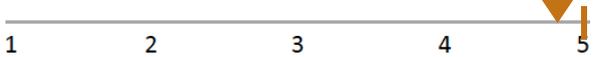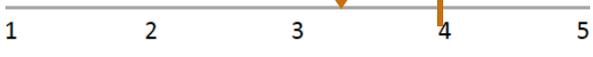
Note 1: Scores are on a 5-point scale (1 is Strongly Disagree and 5 is Strongly Agree)
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Team Dynamics Coaching

Install behavioral feedback into the team's culture

At first blush, team members often think that they give each other feedback. Most of the time that feedback is about progress on projects or performance against goals. What is less common in teams is the giving and receiving of behavioral feedback.

Behavioral feedback happens between two or more individuals with the intention to improve the working relationship or the team's dynamics. Behavioral feedback works because we often have blind spots, and the feedback can raise our awareness about the unintended and unproductive impact of our actions.

While most people appreciate behavioral feedback, we act as if people loathe it. One of the things that teams can do is make giving and receiving feedback a team norm, which the team agrees that to give and receive feedback in the service of helping the team.

One of the ways to create a team culture of giving and receiving feedback is to conduct an exercise that we call "Speed Feedback". Each person gives feedback about two things you are doing well and one suggestion for improvement in a structured round of 4-5 minutes. Each

team member gives and receives feedback from everyone on the team. Because of the 2:1 ratio of positive to suggestive feedback, people tend to have an overwhelmingly positive experience with the exercise.

While people often focus more on the giving of feedback, the receiving of feedback is equally important. If the receiver is defensive, the giver will choose to pass next time. It takes practice to learn to listen when receiving feedback, which is needed to install feedback into the team's culture.

Meeting Processes Coaching

Use agendas skillfully to focus meetings on the most important topics

Showing up for a meeting that either has no agenda or has a poorly designed one invites an ineffective or inefficient meeting. You are bringing together your most important people and an agenda aligns people for the meeting. You need a plan for the meeting to go well.

Designing and promulgating a good agenda often requires team member input. This takes a bit of process and time, even if it is as simple as a Slack message to the team channel two nights before the meeting. The key is to surface the urgent and important topics. Either the team leader or their delegate should then analyze the inputs to draft the agenda.

For an agenda to be most effective, there needs to be a careful measurement of the amount of time for each agenda item. We see all the time agendas that are jammed with topics that inevitably consume too much time. In these cases, either the team gets frustrated because the team is moving through agenda items too fast or items get pushed to another meeting, which can often have negative effects due to timing.

The best agendas have framing questions for each item. These take some thought to work. Ideally, these framing questions are part of the agenda and go out in advance so people can prepare. Framing questions make it easier for team members to monitor whether the team is on topic.

While it is not necessary to use agendas for short meetings like daily standups, for meetings where you need to debate and decide on important matters, taking the time to draft a well thought out agenda can set the stage for an effective and efficient meeting.

Team Dynamics Coaching

Put in place the conditions for risk taking and vulnerability

Risk taking and vulnerability are central to trust on teams. At the root of both is psychological safety, which is the shared belief held by team members that the team will not embarrass, reject, or punish you for acting or speaking up. Risk taking and vulnerability are related but different concepts.

Risk taking is about acting or speaking up that may go against the grain or lead to an impact that is not desirable. It is a leadership action that often flies in the face of conventional wisdom. Often the situation in which a risk is taken is fraught with uncertainty, which makes the action riskier. The presence of an authority figure usually increases the perception of risk.

At the heart of risk taking is the tension among courage, judgment and the fear of failure. Courage is needed to push through inner resistance and overcome the fear of failure. Judgment is needed to assess fear to overcome versus unhelpful inhibiting fear.

The team's leader and the team members collectively can do a lot to promote risk taking. Teams can celebrate risk taking, and team members can recognize people take risks, whether their action led to a productive outcome or not. Team members can encourage each other to push themselves out of their comfort zone, and they can watch out for each other and guide potential risk takers back to a safe zone if the risks being considered are ill advised. Teams should discuss risk taking and

how the team can create a climate that supports risk taking in the service of the team.

Vulnerability means being authentic even when you are not at your best. It means dropping your armor and showing your flaws, imperfections, and challenges. Clearly, a high degree of psychological safety is needed for vulnerability.

Vulnerability is also about self-disclosure, where team members make known more of themselves. These sorts of shares foster a human connection, which results in greater trust and team cohesion. The trust and cohesion lead to better collaboration and teamwork.

Creating a team climate supportive of vulnerability starts with everyone adopting a mindset that supports vulnerability. It is crucial that the team leader role model supportive behavior, because a team leader that negatively impacts psychological safety will shut down vulnerability. It helps for team members to discuss vulnerability and psychological safety and how the team can become a safer space to team members to bring all of themselves to work.

Meeting Processes Coaching

Assign someone to guide and manage segments of meetings

To have the most effective and efficient meetings, it is essential that someone be on point to guide and manage segments of meetings. On some teams, the team leader chairs every meeting for the entire meeting. On other teams, the chair is rotated for different topics.

While some might argue that there are effective teams that self-organize without any leadership, we would recommend looking at the overall assessment to determine how well that approach is working. If the scores for "Meetings are efficient" and "Meetings are effective" are low, then you might consider experimenting with assigning people to guide and manage segments of meetings.

There are several functions that segment managers may play. These functions may be concentrated in one person, often the team leader, or delegated to others on the team.

The first function is the driver of the segment. The driver is responsible for preparing the team for the segment. The driver formulates the framing questions as well as the pre-read materials. The driver also lets the team know what is expected of them and whether this is a discussion culminating in a decision. At the start of the segment, the driver sets context and usually asks an initial question to kick things off.

The second function is the decision maker. Obviously, this is only relevant if this is a topic for decision. The decision maker is responsible for guiding the discussion in the direction of a decision. If the decision will be made by consensus or majority vote, the driver will likely handle both functions.

The third function is the facilitator. This is often a function that gets neglected by the team. The facilitator observes and manages the group dynamics in the service of a healthy dialogue and high-quality decision making. If someone with subject matter expertise is not speaking up, the facilitator should invite them to contribute. If there is an unproductive back and forth, the facilitator should intervene to change the dynamic. The facilitator function also monitors for "rabbit holes", which are sequences that are off topic and consume a lot of airtime.

The driver, decision maker, and facilitator functions are a lot to put on one person, which is why the facilitator function gets neglected. Experiment with assigning a chair who handles the driver and decision maker functions and someone else to handle the facilitator functions.

The key is to design meeting processes that achieve the meeting effectiveness and meeting efficiency that you want. Experiment with different management structures until you get the right dynamics.

Team Assembly Coaching

Redesign incentives and goals to promote teamwork

There is an adage – structure drives performance. Misaligned incentives make it hard to promote effective teamwork. It makes team members have to swim upstream to cooperate and collaborate well. This is because many team members are coin operated. Strong performers focus on their objectives to the detriment of externalities. Unfortunately, if these externalities are team collaboration, you are going to have a team problem. There are two common problems, goals and incentives. We'll examine both.

For the goals problem, look at the balance of individual versus collective goals for the team. Do you have well-constructed team goals? Do you put emphasis on these team goals in meetings? Do you put enough attention on them? Or are team goals comprised of the aggregate of the individual goals? You want to focus the team's attention on these collective goals, so they feel more pressure to deliver on the collective goals than their individual goals. Obviously, you want them to achieve both the individual and collective goal, but by applying pressure during meetings on the collective goals you can help them to lift their focus and make good decisions about the trade-offs.

For the incentives problem, you must look at the performance reviews and the compensation structure. It is possible that you may not have the authority to control these levers. If that is the case, you should still understand the structure of both and influence what you can to apply the right kind of pressure. If you do have discretion to modify the performance review process or if you can influence the authorizer of changes, you want to get the balance right on the collective goals and the individual goals. Oftentimes, the performance criteria are vague enough that you can define how the goals will be interpreted. Be sure to set expectations with your reports at the beginning of the cycle and use feedback sessions throughout the period to reinforce both the collective goals and individual goals.

The compensation structure is harder to modify. If you have team members whose compensation is mostly determined by a quantifiable bonus, like sale performance, you will need to both influences heavily the discretionary portion while applying pressure and influence to nudge the behaviors you want to see.

It is important to discuss with the team members how they feel about goals and incentives that may not align with the needed teamwork. Jointly problem solving how to overcome the pressures of poorly aligned goals and incentives can result in team norms around teamwork that the team signs up to jointly monitor and hold each other accountable.

Team Dynamics Coaching

Build skills in confronting and improving group dynamics

Group dynamics refer to the dynamic structures that impact conversations and decision making. These structures can be static, which can be assessed at a moment in time, like trust, or dynamic, which can be assessed in real-time during conversations or decision making. We are going to focus on the oft hidden dynamic structures.

The crucial first step is to become aware of structures of team behavior. Without the ability to observe structures you cannot confront and improve them. Becoming aware is a form of pattern recognition. We are all skilled at noticing different patterns in our work and life and the key is learning to recognize patterns that can impact group dynamics. Using awareness begins with learning concepts that map to the structures and practicing noticing the concept in action.

The simplest structure to notice is speaker patterns. Who speaks the most? Who speaks the least? Does someone always contribute after someone else? Are there gender patterns or cross-cultural patterns? Speaker and speaking patterns are a great place to start when learning to observe team dynamic structures.

The next level of structure we recommend is called the "Roles". The four roles are "Move", "Follow", "Oppose", and "Reframe". These four roles play out in any conversation and are happening in parallel with the content of the conversation. Learning more about the Roles sharpens your understanding of this structural dynamic and then it takes practice to notice the concepts in action.

Once a foundational level of awareness is developed, you can start to notice sequences of interaction.

The next level of structure we recommend is called the Languages. The three languages are "Action", "Meaning", and "Care". Like the "Roles", the Languages happen alongside the speaker patterns and the languages. When individuals are speaking from different languages, it makes it hard to communicate and breakdowns occur. Learning how to assess in action the languages gives you the ability to get everyone aligned with the language needed for the topic or decision at hand.

The final level of structure that we recommend is called the Systems. The three systems are "Closed", "Open", and "Emergent". The systems determine the degree of structure or order, participative engagement, or autonomy in conversations. Oftentimes there will be conflict when individuals are speaking from different systems.

Once you have developed a foundational level awareness about these structures, you will have a greater ability to notice other structures in real-time. With that awareness comes an ability to intervene to improve the group dynamics.

While individual mastery can be instrumental to improving group dynamics, raising the awareness of structure and increasing the capacity of the team members to improve group dynamics is the key to building into the team the ability to course correct and address dysfunctional dynamics as it happens.

Meeting Processes Coaching

Institute a process to track action items and decisions made

Effectively tracking action items and decisions made are two interrelated meeting processes that are often neglected. An important function of a team is that it gets things done and implements decisions. A process shortfall in that area and hamper the team's effectiveness.

It is important for the team to have a process to document action items. Identification of action items can happen at any stage of the meeting. Before the end of the meeting, the action item should be assigned to an individual. While some might question the need for a structured approach, the reality is that action items that are not tracked seldom get done. If it is a high enough priority for the team to deliberate and identify it as an action item, it should be tracked and followed up on. In a future meeting, there should be a lookback at action items and the responsible individual should update the team.

Identifying action items is particularly important when decisions are made. Who is responsible for what and by when? Identifying the responsible parties is a key linkage between the decision and implementation. Too often we make a decision and immediately move to the next topic without stopping to clarify next steps.

The team should document decisions made. Tracking decisions made is important because teams often recycle decisions, open up the decision for further consideration. When this happens, the team should be conscious that this is a topic that was previously decided upon. There should be a good reason to revisit the topic. Decisions made should be published in a forum that is easy for team members to reference. Documenting and tracking decisions is also helpful when on-boarding new team members.

When decisions are made, it is important for the team to discuss what will be communicated to the organization. Taking the time to clarify the talking points is important, especially if the decision is about a big change impacting people. A failure to align on the messaging results in each team member using their individual judgment about what to communicate. This inevitably results in poor alignment and inconsistent messaging.

Some team members bristle at structure and process, wanting instead a loose form of control where individuals self-manage around action items and decisions. Unfortunately, a lack of structure and process tends to result in poor team functioning. The best run teams were architected to be that way and have the operational discipline to adhere to structure and process.

Meeting Processes Coaching

Set expectations around using pre-reads for important topics

According to a survey from HBS and Boston University, 71% of managers surveyed said they find meetings to be unproductive and inefficient. One of the primary causes of inefficient and unproductive meetings is the lack of adequate preparation for the meeting.

Many teams make the mistake of using a presentation document as the pre-read. This is ill advised because the presentation document is designed to be interpreted with the presenter's voiceover. The read lacks the context to interpret correctly the full information intended to be presented.

Instead, pre-read materials should be designed for independent review. Framing questions for each slide or segment should be designated. Each slide should contain far fewer pieces of information than presentation slides. Takeaways should be flagged for easy viewing. The number of slides should be culled to the absolute minimum.

We recommend that pre-read materials have a narrative structure. Amazon uses six-page memos for important topics, which take a week or more to prepare. Twitter and Square adopt a similar practice. Other companies require a voice-over presentation, which can work well. We like the voice-over presentation, which takes just a bit of a learning curve but then becomes highly efficient. The goal here is to push the presenting to the pre-work so precious team time can be reserved for Q&A and discussion about the pre-read.

The next mistake that teams often make is not sending out the materials with sufficient time for thoughtful review. Sending out a pre-read a day in advance does not respect people's time, even if that is not the intent. The team should discuss and agree upon the material sending deadline and stick to it.

Even if you execute a great pre-read, it can still go off the rails if the team members do not carefully consume the material. Even one team member blowing off the pre-read can block the team from having a discussion that starts from a common level of understanding. The team should discuss and agree to doing the pre-reads..

The last pitfall to address is the meeting. You can do everything else right and still blow it if the presenter acts as if the preparation did not happen. It is infuriating for team members to do the hard work to prepare only to have the presenter read the slides to them in the meeting. Instead check for preparation and then launch into discussion, ideally with a framing question that was sent out in advance. Reward the team with a high-quality discussion.

While there is a lot to come together to have a productive meeting, applying the principles of effective meeting design is the only way to set the table for a productive discussion. Not doing so is guaranteed to result in inefficiency and likely ineffectiveness. We recommend that you start with a few topics to get some momentum before adopting the approach more consistently.