

# TEAM ASSESSMENT REPORT

Report for: Executive Leadership Team (Example)

Date: 2021

Report provided by: Jacob Westerberg, Ph.D.

Report intended for developmental use only.

## Overview

The data in this report details the strengths of the client's identified work team, as well as identifies areas of opportunity for the work team to develop in order to be more effective in their work together. This survey included six conditions that have been identified as predictors of team effectiveness, as well as supplemental conditions such as process related dimensions. Qualitative data was derived from both observation and interviews and were incorporated into this report to add dimension to the data from the survey.

### Brief Overview of Team

The team assessed in this report works for ExecutiveTeam. ExecutiveTeam is a third-party onsite inspection firm which provides numerous risk compliance services, including compliance assurance of consumer reporting, occupancy verification, employee verification, and oversight of debt collection practices. The 8-person team analyzed in this report is responsible for coordinating client requested site inspections with ExecutiveTeam's vast network of independent inspectors throughout the United States, Canada, the US Virgin Islands, and Puerto Rico. Specifically, this team is responsible for identifying local inspectors, negotiating per diems to complete inspection jobs (e.g., payment for miles traveled to get to inspection site), and confirming completion of inspections, often within short time frames.

### Methodology

The President of ExecutiveTeam, was the main point of contact for this engagement. After the initial meeting, approval to move forward was provided from the President of ExecutiveTeam who also assisted in coordinating with the identified team. All parties signed a Non-Disclosure Agreement before the engagement commenced. The Team Diagnostic Survey (TDS) was administered electronically via email. The survey was hosted through Qualtrics and all data collected remained anonymous. A total of seven (7) members completed the survey. Only one (1) member of the team did not complete the assessment due to the individual's short tenure as part of the team [one (1) week].

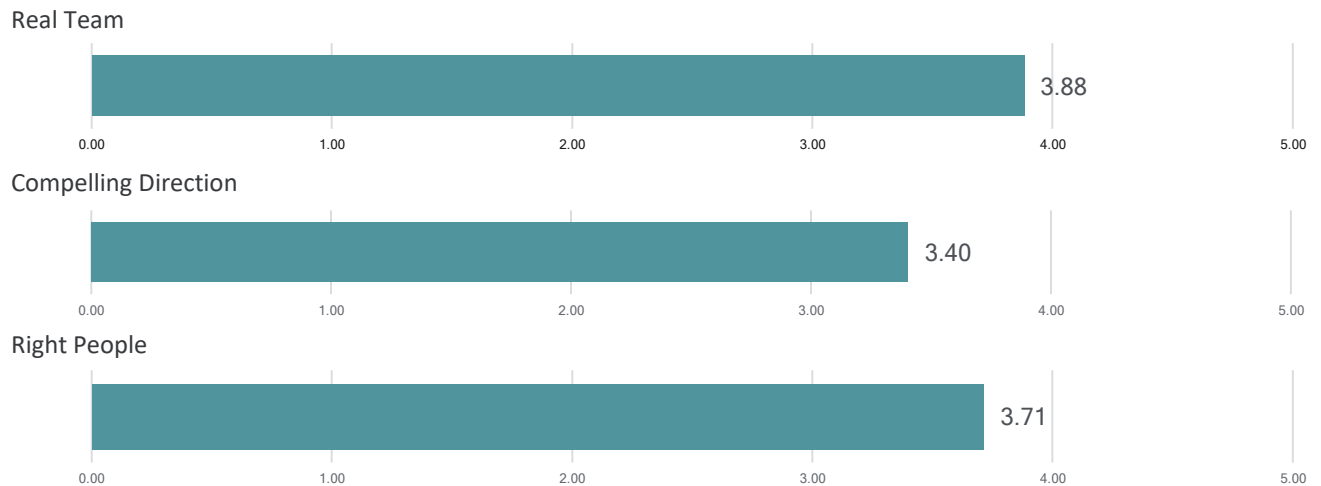
After the assessment was completed, one of the team's weekly meetings was observed to gain insights into the team's work dynamics. This meeting occurred onsite and lasted approximately one (1) hour. WLS used its propriety field observation framework TeamWeb. TeamWeb captures categories such as verbal behavior and interactions, personal space, physical behavior and gestures. Once the observation was completed, three (3) members of the team were interviewed. One (1) team leader [male] and two (2) team members [one (1) male, one (1) female] were interviewed utilizing a standardized interview guide. The interviews lasted approximately twenty (20) minutes and additional probing questions were incorporated as needed.

## Six Conditions for Team Effectiveness

The six conditions for team effectiveness are divided into two separate categories: the essentials and the enablers. The six conditions are important for a team to perform effectively and account for up to 80% of team effectiveness. The data presented below can be utilized to determine areas of strength and identify areas of opportunity for this team to improve. Each dimension is analyzed further into detail later in this report.

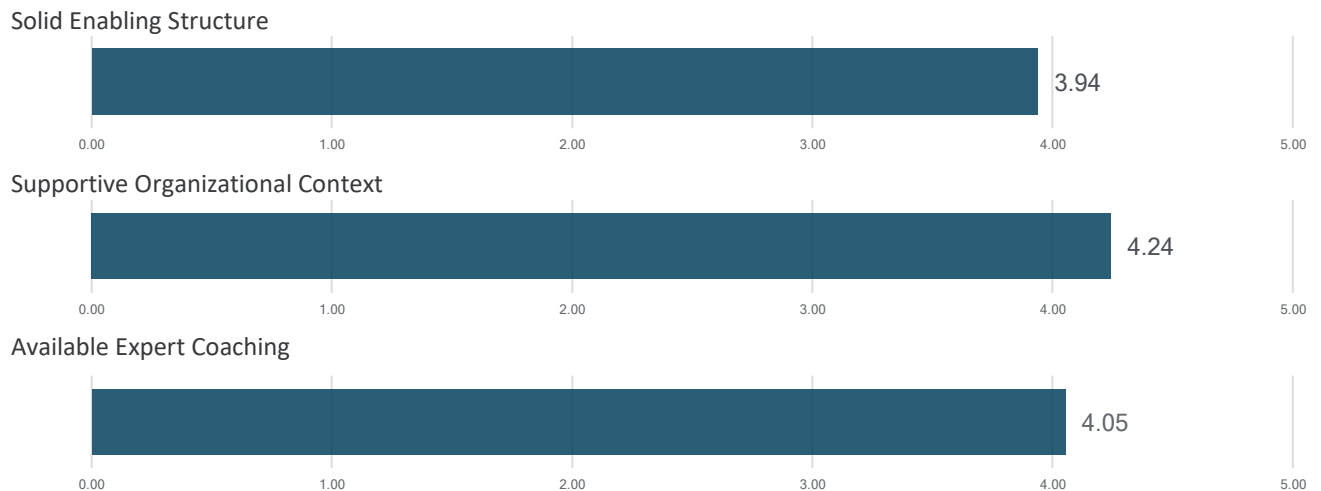
### Essentials

Three essential conditions that are necessary to set a team's foundation for success. These include having a real team, a compelling direction, and the right people on the team.



### Enablers

Three supporting conditions enable a team to achieve its optimal effectiveness: solid enabling structure, a supportive organizational context and having expert coaching available. It is critical to assess these conditions to ascertain if the team's success will be supported.



# Essentials

## Compelling Direction



A compelling direction is one that is challenging, clear, and consequential. This direction ultimately specifies the group's overall purposes. With a **challenging** direction, members are energized and motivated to perform well. A **clear** direction is one that emphasizes the main purposes of the team and task at hand. Lastly, a **consequential** direction encourages members to use the full range of their talents and abilities.

### Clear\*



### Challenging



### Consequential\*



\*Indicates a gap of at least 2 points between participants

### Interpretation:

- Data for this condition show an overall score of 3.40, indicating that the group has an understanding of the team's purpose, however, could benefit from setting energizing and challenging goals to enhance the team direction.
- With a high average rating of 4.14 in the category of clear direction, members seem to understand their team purpose and the necessary strategies to accomplish that purpose. Interview data supports this result as team members were able to clearly express the team purpose and goals.
- A challenging direction is rated the lowest out of these three characteristics, with members' ratings averaging a 3.21. This may mean that team goals are not challenging enough or are too challenging. It is important for these goals to be balanced, both realistic and challenging.
- For the most part, members seem to agree that their team direction is consequential, meaning that members talents are being utilized, with a high average rating of 4.29.

### Recommendation(s):

- This team may value from setting more energizing goals. Because team members averaged a rating of 3.21, it is suggested that members neither agree nor disagree that their goals are energizing. To increase this rating and, consequently, enhance team motivation, challenging yet realistic goals should be set. From the interview data, it seems as though members know what they need to accomplish, however, the high stress level and workload are evident as well. These stress factors seem to play a role in goal accomplishment. Perhaps, then, more realistic goals are needed to facilitate greater feelings of accomplishment and motivation.

# Enablers

## Expert Coaching



Team coaching is intended to support team members in the most effective use of their collective resources when performing a task. Examples of team coaching include leading the launch of a team before their task begins, offering feedback, and asking reflective questions. Expert coaching aims at building the teams capacity to work together.

Coaching cannot substitute for the critical team conditions like a compelling direction, team structure, and a supportive organizational context. However, when a team is functioning well, team coaching can be a beneficial component to team processes.

## Availability



## Helpfulness



## Task-Focused



## Operant



## Interpersonal\*



## Avoids Unhelpful Initiatives



\*Indicates a gap of at least 2 points between participants

**Interpretation:**

- The expert coaching condition represents the degree to which team members believe they experience, and have access to, coaching that provides motivation, guidance, and the development of the team's collective skill and knowledge. Rated with an overall score of 4.05, team members find that they are provided with these important coaching services.
- Observational data from a team meeting showed that team leaders demonstrate an available and helpful orientation to team members who may need support in their work.
- The lowest rated subscale was "Avoids Unhelpful Initiatives," which refers to leaders perhaps engaging members too often in activities in which value or usefulness is not immediately seen.

**Recommendation(s):**

- The team leader could make sure that initiatives to support the team are desired and valued by team members. This could be done by co-creating, or soliciting feedback from team members regarding the goals and initiatives they may want to take part in.
- Additionally, team leaders should be aware that coaching is most effective at certain points of a task when team members are likely to be most responsive. In the midst of a stressful or complex task, members may have a hard time being receptive and open to coaching. Thus, any coaching attempts should be intentionally time around when members are likely to be more receptive to motivation, feedback and guidance, or reflection.
- Simply asking a team member, "is now is a good time for some feedback/guidance/reflection," can be telling as to how receptive they may be at that point in time. Additional information on coaching styles and time is provide below.

**Coaching Styles:**

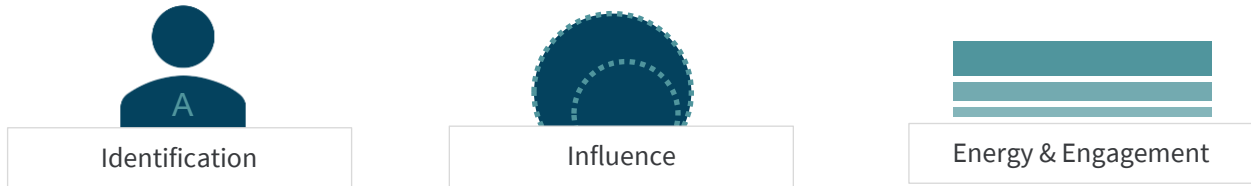
- Motivational coaching seeks to address the effort a team put towards their task, with the aim of reducing social loafing and maximize shared commitment.
- Consultative coaching addresses performance strategy by assessing norms to establish the most effective working norms.
- Educational coaching focuses on knowledge and skill development to support the team's capacity to work well in the future.

**Timing in Coaching:** Coaching interventions should be coordinated with time markers in which teams are most receptive to coaching:

- **Beginning:** The team's launch is a critical time for members to become oriented with each other and their task. As this marks many of firsts for a team, this time is best suited for a team leader to motivate a team.
- **Midway point:** Once team members are familiar with each other and their task, and have logged some experience working towards their objective, this midway point is ideal for a team leader to facilitate reflection on the progress made and strategy take by the team.
- **End:** When a team's task is nearing completion or has been completed, this is an ideal time to capture and internalize lessons learned from the team's experience.

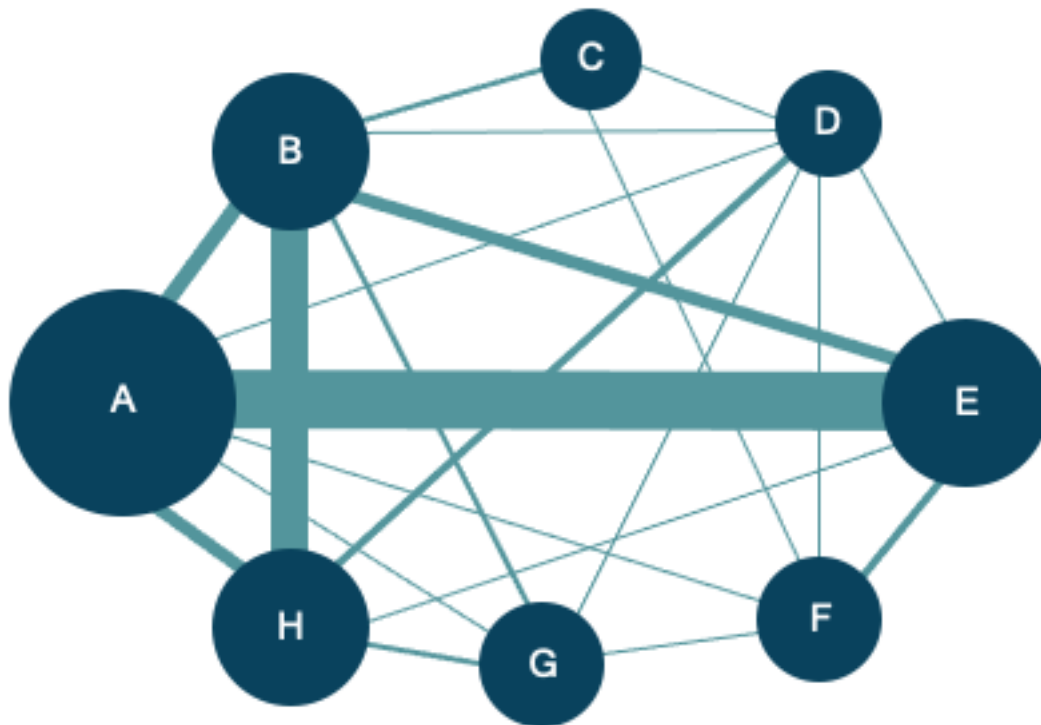
# TeamWeb®

**Team Conversational Dynamics:** The way a team communicates is critical to their success. Productive teams have certain data signatures that consistently predict their success. Research on team conversational dynamics show that in the most productive teams everyone on the team talks and listens in roughly equal measure (Pentland, 2012). In this context, the frequency of exchanges between team members is known as *energy*, and the distribution of this energy is known as *engagement*.



**Sociographic of Conversation:** Mapping a team's conversational exchange can provide an insightful visual aid into how the team communicates, with the goal of increasing member awareness and achieving more even contributions from each team member during meetings.

**Data Source:** Executive Team Meeting - January 15, 2021



**Analysis:** Based on the information gathered from one team meeting (there appears to be a few team members who were heavily engaged and influential in this team meeting (e.g., A, B, & H). While some members were visibly more reserved during this conversation (e.g., C, D, & G).

## Overall Team Effectiveness



As seen from the collected TDS data, this team scores above average (3) on each of the team effectiveness categories (essentials and enablers) and process categories, with an overall team effectiveness rating of 3.86.

Through the assessment, interview, and observation data collected, we also found potential areas of improvement to promote even greater team effectiveness.

### Recommended Actions:

- Grow the team but enhance the selection criteria.
  - Team stability and size have both been recognized as issues. Members note the high turnover and have discussed bringing additional members to the team in order to better manage the workload. Because of this, we suggest that criteria for team member selection be enhanced. When interviewing a candidate for team membership, it would be valuable to make sure he/she can handle and excel in a high-stress and fast-paced work environment. Members also note a steep learning curve when first starting on the team, which should also be mentioned and considered within the selection process.
- Allow for greater interdependence on projects.
  - Promoting greater interdependence on projects may also be helpful because team members will be able to work with one another more frequently and utilize their strength of strong interpersonal skills. Greater interdependence in task completion may look like assigning two (or more) members to a project. This may also benefit the team because, as noted within the interviews, team members often struggle asking one another for help.
- Ask team members for input on initiatives and direction.
  - By leaders asking team members for input regarding initiatives they desire and goals they want to collectively set, there will be a sense of co-creation and participation that will enhance motivation.
- Highlight team member skills, abilities, and accomplishments.
  - In team meetings, it may be beneficial to highlight team members' skills and abilities in order for other members to know whom they can turn to for help. Also, highlighting team accomplishments and individual member accomplishments will contribute to high team morale and increase motivation within stressful times.