Team Charter events
Building best teams

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Today's Objective

Experience creating a team charter/contract that supports every team member being aligned on goals, roles and behavioural norms
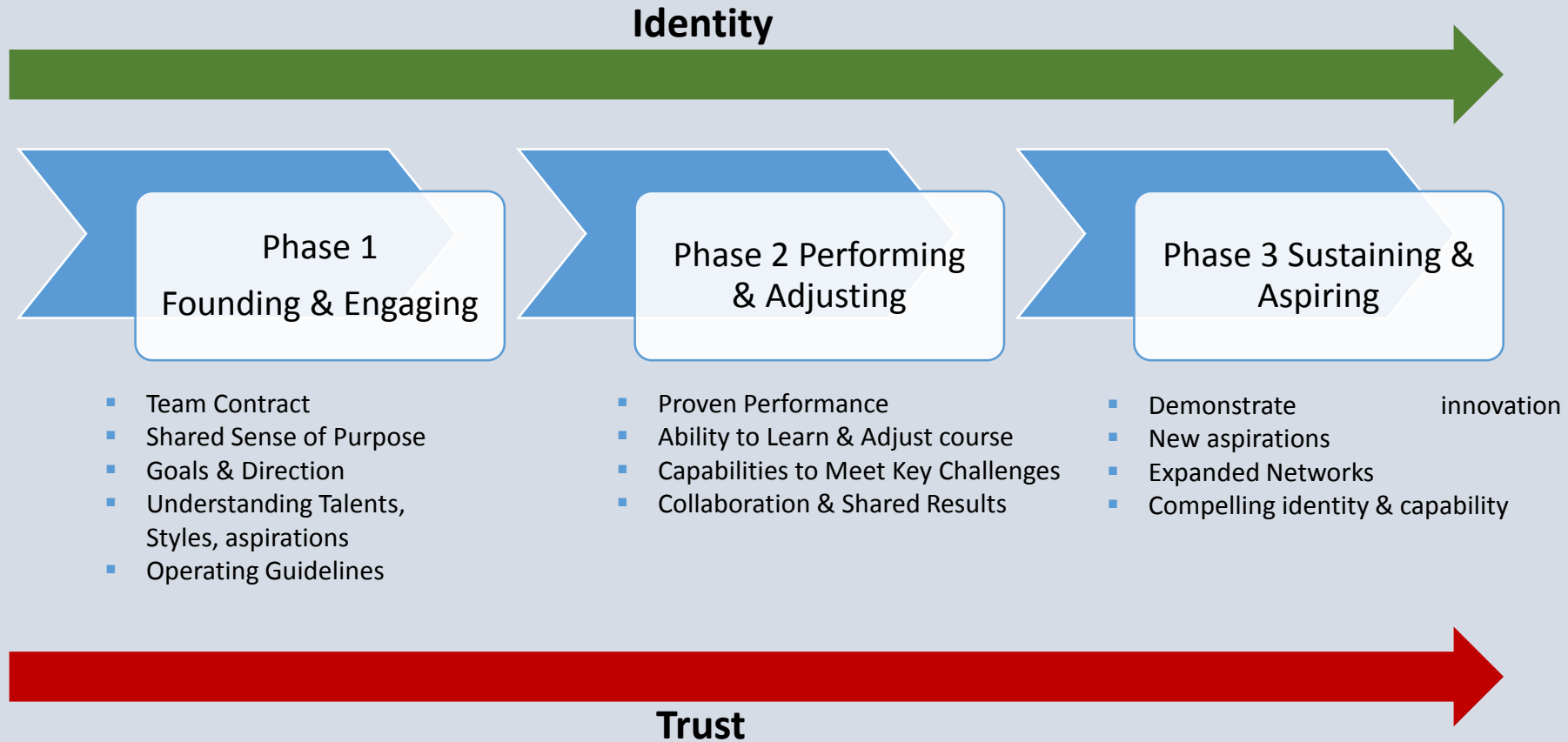
Well designed teams that start on a good track tend to perform even better as time passes
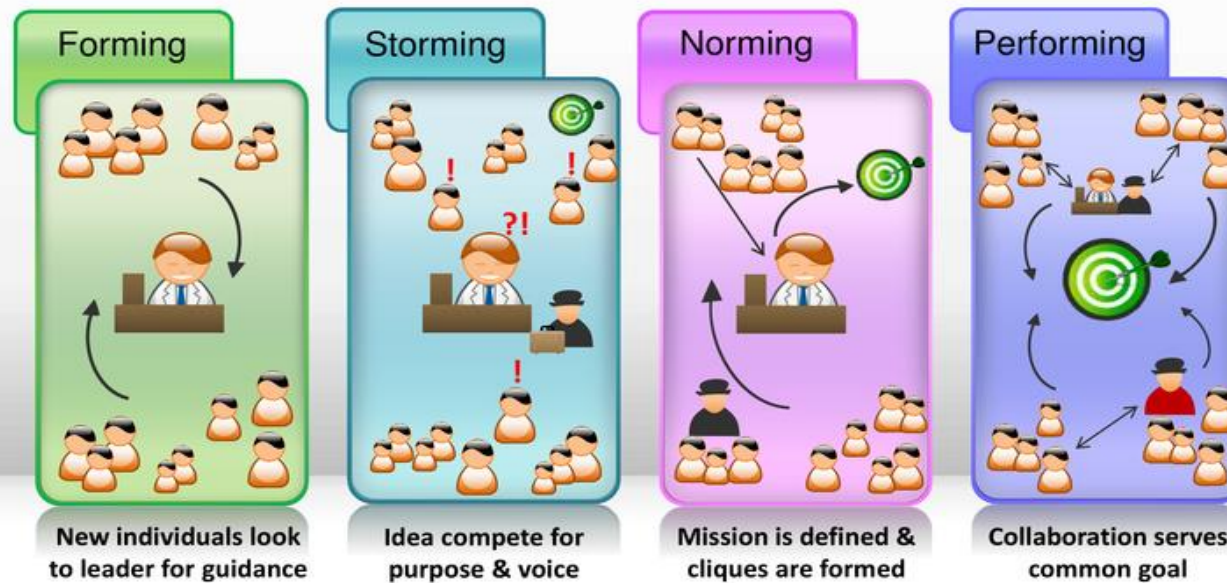
teams?

What is the difference between a good and a bad team?

What is a typical Team Journey?

Identity

Phase 1
Founding & Engaging

Phase 2 Performing & Adjusting

Phase 3 Sustaining & Aspiring

- Team Contract
- Shared Sense of Purpose
- Goals & Direction
- Understanding Talents, Styles, aspirations
- Operating Guidelines

- Proven Performance
- Ability to Learn & Adjust course
- Capabilities to Meet Key Challenges
- Collaboration & Shared Results

- Demonstrate   innovation
- New aspirations
- Expanded Networks
- Compelling identity & capability

Trust

The first phase further explored

Forming — New individuals look to leader for guidance

Storming — Idea compete for purpose & voice

Norming — Mission is defined & cliques are formed

Performing — Collaboration serves common goal

Team Chartering (Establishing a Team Contract) helps in moving toward 'performing'

Team Charter Framework
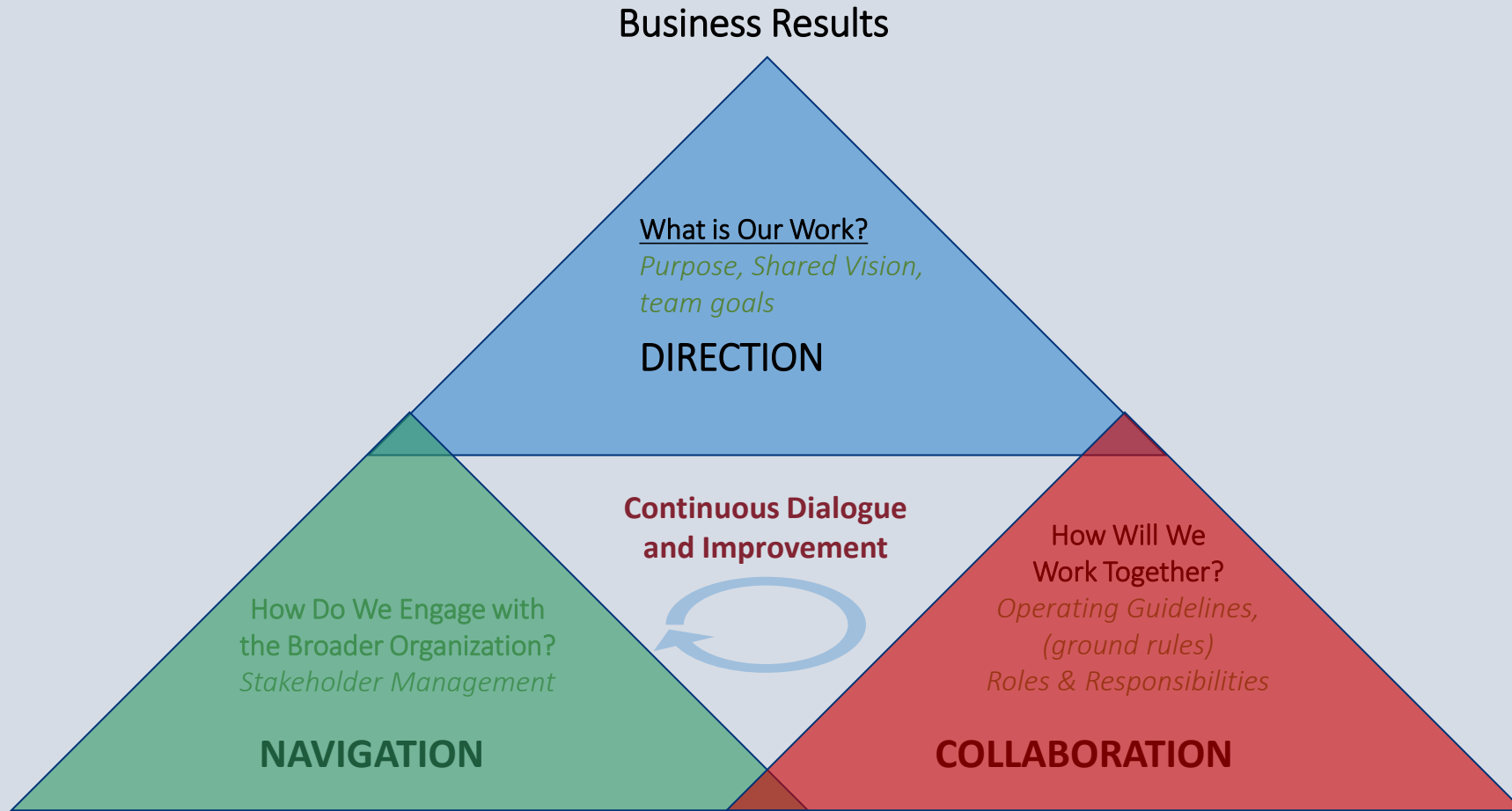
CONTENT OF A Team Charter

Foundation and Engagement

Performing and Adjusting

Team Chartering Overview	Overcoming the Challenges Overview

Team Purpose
Why Your Team Exists

Shared Vision & Goals

Operating Guidelines

Roles and Responsibilities

Key Stakeholders

Communicating for Alignment

Decision Making

Team Learning

Productive Conflict

High-performing teams articulate their unique value to the business and stay focused only on the work that delivers that value

Lets do a mini event together!

You are part of a new brand team that is expected to launch a new innovative medicine (oncology/lung cancer) in 24 months from today. A team charter event was been scheduled. The team consists out of representatives of: Marketing, Medical Affairs, Value & Access, Sales and Business Analysis

Today's Rules of Engagement (or agreements)

- Respect the values

- Contribute

- Be open

- Appreciate any feedback

Take 100% responsibility for your 50% of a relationship

What does a Team Charter event look like?

Sequence of Modules:

1. Team Purpose
2. Shared Vision and goals
3. Operating guidelines
4. Trust (bank account exercise)
5. Roles and Responsibilities
6. Key Stakeholders

Recommendations:

- Complete face-to-face
- Plan to spend about a half day to establish your team charter
- It is modular...you don't have to complete it all at once
- Regularly review and update Team Charter

1. Team Purpose
what are the characteristics?

- Describes explicitly why you exist as a team

- Describes your unique value to the organization

- Clarifies your scope of work
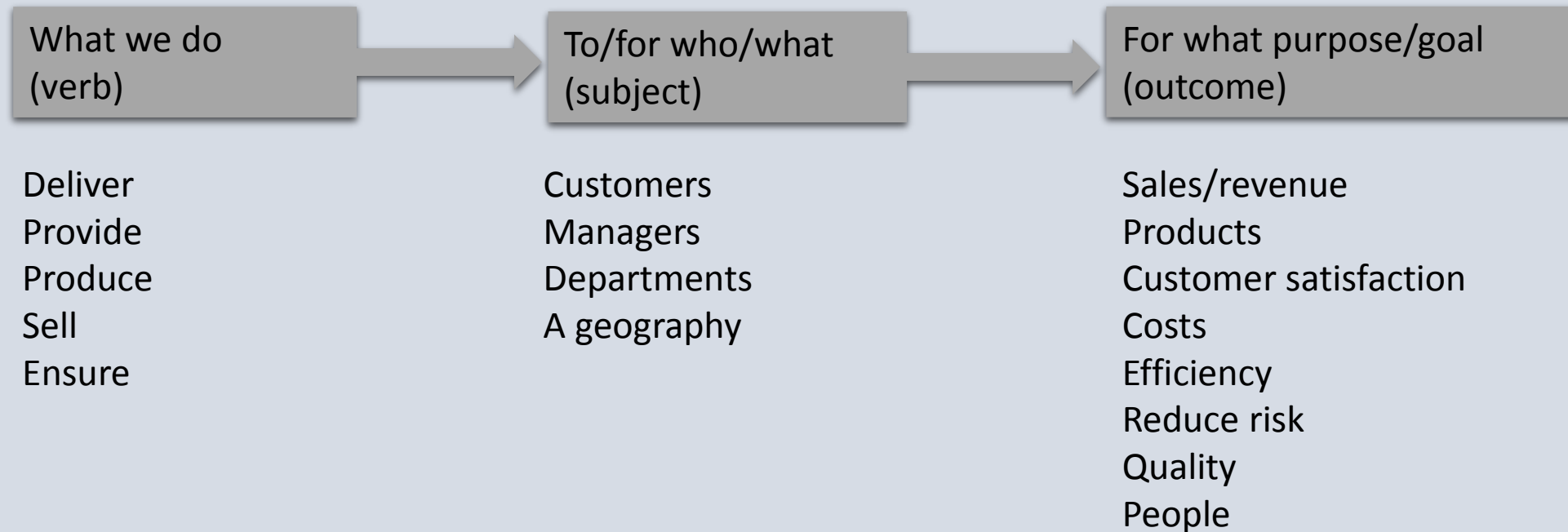
- The team needs to be aligned on the purpose

This is Your Elevator Speech

1.Team Purpose
It is a simple and impactful one sentence statement

So what....

What we do (verb)	→	To/for who/what (subject)	→	For what purpose/goal (outcome)

Deliver	Customers	Sales/revenue
Provide	Managers	Products
Produce	Departments	Customer satisfaction
Sell	A geography	Costs
Ensure		Efficiency
		Reduce risk
		Quality
		People

1.Team Purpose
please define your Team Purpose

- Each of you get 6 post-it's
- Each of you write 2 suggestions for the verb, subject & outcome
- All team members put them on a wall
- We jointly cluster them
- Leader takes the input and defines a draft proposed purpose to the team

Group 1: Be prepared to do a plenary report-out

2. Shared Vision
what is the team's dot on the horizon?

- **Aspirational:** It creates the right amount of "stretch"

- **Compelling:** It engages and connects with people

- **Directional:** It allows for translation into action

dot on the horizon

Shared Vision describes Desired Results *in a context that matters to the* business

2. Shared Vision

How to Articulate a Shared Vision?

- Focuses on the *result*, not the process

- What *success* looks like

- Identifies what you aspire, not what you think is possible

- Is *clear* and *specific* enough so that you'd know it if you had it

- Stated in the *present* as if you already have it

- Is shared
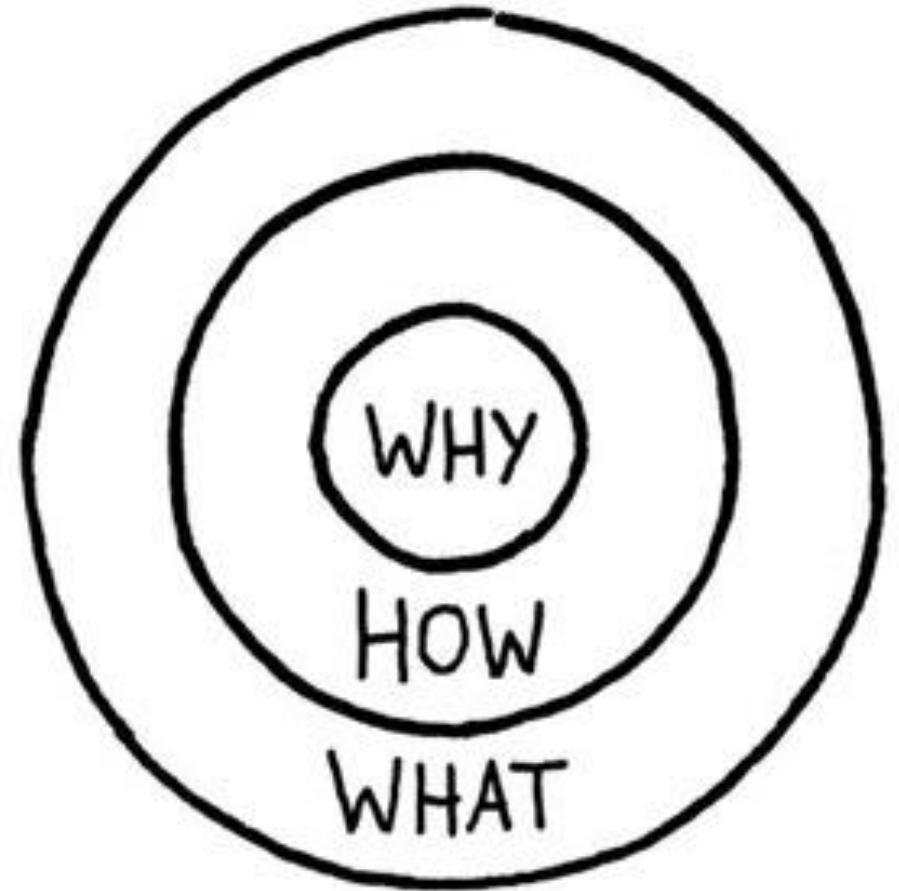
Template could be: **What we want to accomplish in_____year(s) is…**

2. Shared Vision

Vision examples

Fill the earth with the light and warmth of hospitality

To Create a Better Everyday Life for the Many

A computer on every desk and in every home

2. Shared Vision

please define your shared vision

OPTION 1

- Private Collection - Define your vision for your team/brand
- Share and put your input on a wall
- Jointly cluster them
- Teamlead takes the input and defines a draft shared vision to the team

OPTION 2

- Split the team in half
- One half completes the Fortune poster and the other half the Misfortune poster
- List and combine the key take aways
- Teamlead takes the input and defines a draft shared vision to the team

3. Operating guidelines
why operating guidelines are important

- Align expectations on "rules of the game"

- Deal effectively with interdependence and conflict

- Enhance open communication, and reinforce trust and team identity over time

3. Operating guidelines
what do we mean with operating guidelines?

- Explicitly stated principles that describe how a group intends to interact to achieve its Shared Vision

- Based on organizational, team and individual values

- Used to guide day-to-day behavior, interactions and decision making

- Appropriate for any type of team with performance goals – managerial, project, ad hoc, etc.

3. Operating guidelines
Examples of questions to consider

How We Prioritize Our Work

- How can we separate what is urgent from what is important so that we avoid "fire fighting"?

- If we lose our focus on our priorities, how might we productively refocus our attention on our Team Vision?

How We Interact Inside the Team

- How do we ensure that all team issues are discussed when the team is together?

- How do we keep the team up to date when attendance to our meetings varies?

How We Decide

- How can we ensure our decisions stick, without having to revisit them repeatedly?

- How do we ensure decisions get made when everyone feels the need to have a voice on the issue?

How We Interact Outside the Team

- How do we speak with a common voice about issues when confronted with external challenges?

- How do we balance the individual's functional priorities with those of the team?

How Do We Prioritize, Decide, Interact and Handle Conflict

3. Operating Guidelines
please define your operating guidelines?

- Do private collection

- Put your input on the flip

- Jointly discuss and Cluster

- Teamlead takes input and proposes draft operating guidelines to the team

- Team validates

Your topics are Prioritizing, Decision making and Conflict handling

3. Operating guidelines
how to support Trust?

Trust is like a bank account, based on experiences we either make deposits or withdrawals

Establish in the team what attitude and behaviors

- Build Trust
- Destroy Trust

3. Operating guidelines
Example of trust bank account

Trust builders

☺ Engage and listen to understand each other

☺ Be transparent and honest in communicating to each other

☺ Give appropriate praise and recognition after successes and achievements

☺ Give frequent and constructive feedback

☺ Socialize and show genuine interest in one another

☺ Be accountable for your decisions and actions

☺ Deliver on what you promise

☺ We got each other's back

☺ Operate with one voice towards the organization

☺ Contribute beyond your function

☺ Act with: Amgen first, Affiliate second and Function third

Trust destroyers

! Personally criticizing each other

! Talking about someone instead of talking with someone

! Not delivering on promises and responsibilities

! Loss of emotional self control

! Withholding relevant information

3. Operating guidelines
Speeddating, a Sample of follow-up

- List for all:
    - 1 piece of positive feedback
    - 1 piece of critical feedback
- Rotate and have 5 minute feedback conversations
- No defensive responses allowed
- Collect the feedback that you received
- Report-out on your personal insights and learnings

There are even more sophisticated approaches using trust cheques

3. Operating Guidelines
please define your operating guidelines

- Do private collection

- Put your input on the flip

- Jointly discuss and Cluster

- Teamlead takes input and proposes draft operating to the team

- Team Validates

Your topics are how to communicate in the team and ensure trust
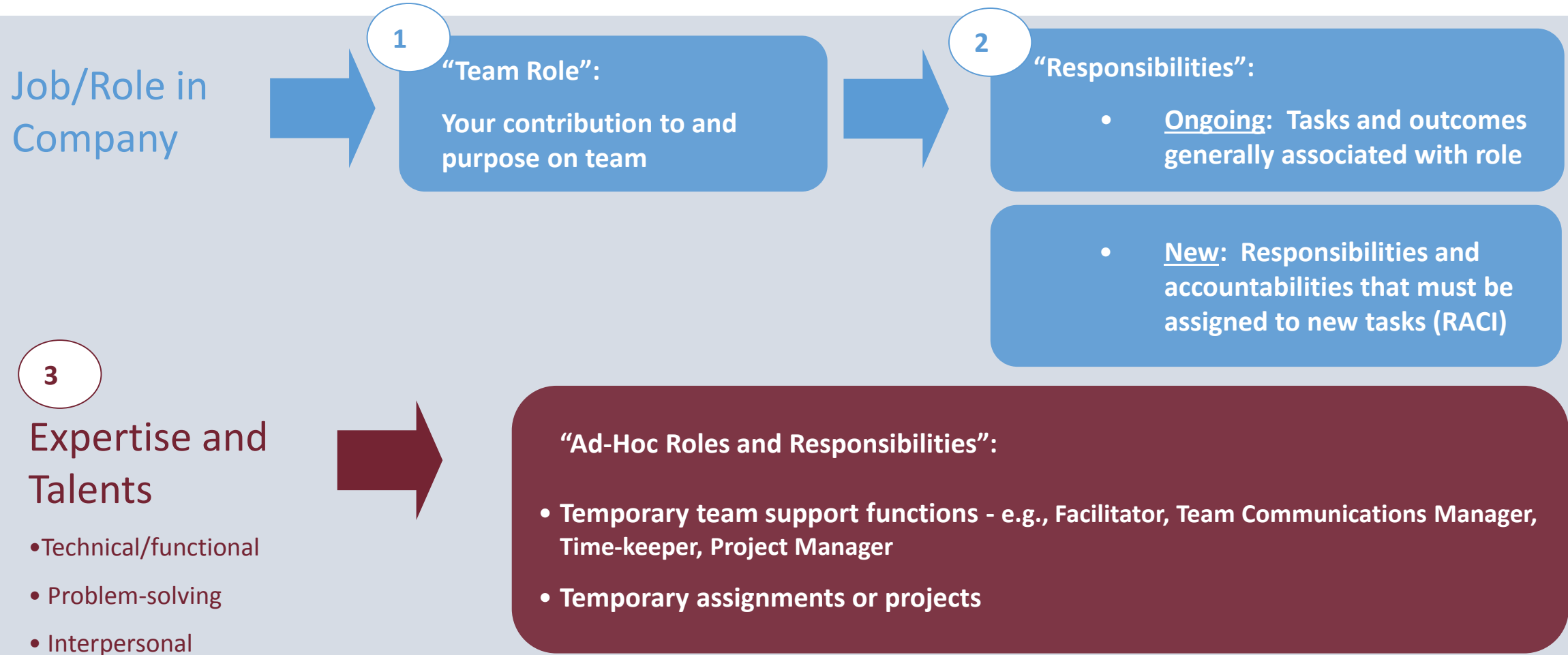
4. Roles & Responsibilities

Why clarity is critical?

- Team fulfills purpose and achieves desired goals in an efficient and timely manner

- Improves collaboration among members

- Enables team to adjust more easily to changing work requirements

- Team can better leverage members' individual strengths and expertise

4. Roles and responsibilities assign roles based on 2 considerations

Job/Role in Company

1 "Team Role":

Your contribution to and purpose on team

2 "Responsibilities":

- <u>Ongoing</u>: Tasks and outcomes generally associated with role

- <u>New</u>: Responsibilities and accountabilities that must be assigned to new tasks (RACI)

3

Expertise and Talents

- Technical/functional
- Problem-solving
- Interpersonal

"Ad-Hoc Roles and Responsibilities":

- Temporary team support functions - e.g., Facilitator, Team Communications Manager, Time-keeper, Project Manager

- Temporary assignments or projects

4. Roles & Responsibilities
RACI as Tool to Define Roles & Responsibilities

Safety Culture Example

TASKS:	Sharise	Kim	Jack	Rafael	Max	Mei
Develop Training Programs	A	R		C	I	
Develop Communication	A		R	C		
Develop Safety Goals & Metrics	I		A		C	R

Responsible: Carry out the work; execute the steps of the process

Accountable: The buck stops here; ensure steps are complete

Consult: If major changes to process need to be made; SMEs

Inform: Need to know; communicate to who and how

Select the key processes and potentially unclear processes to clarify

4. Roles and responsibilities

Describe the roles & responsibilities in your team

- Select 2 key processes

- Define the roles & responsibilities using the RACI tool

- Assign adhoc roles too

5. Key Stakeholders (management)
Why map and manage stakeholders?

- Gain organizational support and resources
- Leverage knowledge and capabilities
- Ensure external clarity and alignment with the team's work
  - External to the team
  - External to organization
- Test the team's thinking about its work and its Charter

5. Key Stakeholders (management)
mapping your Stakeholders

Name/ Type	What must we work together or align on	What they need from us	What we need from them	Who is responsible for collaborating	How often do we need to meet and what format
Person / Group A *Sponsor*					
Person / Group B *Influencer*					
Person / Group C *Collaborator*					

Identify, analyze and plan engagement with 2 Stakeholders (groups)

Team Chartering
Next Steps

- Document charter

- Sign-off on Charter

- Put it in practice and keep one another honest

- Next to results do regular check-ins on below topics and adjust:
  - Contribution to Shared Vision
  - Operating guidelines in particular Trust Bank Account
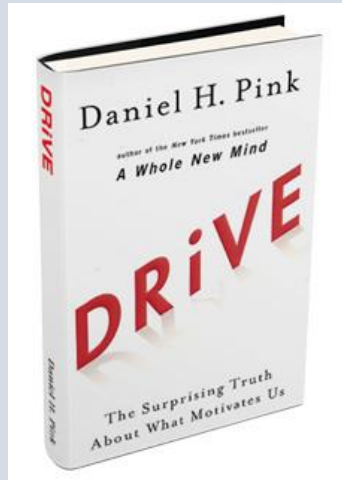 - Roles & Responsibilities

"If you can dream it, you can do it."

Walt Disney

And Remember…

Your role as leader is key

Your team members are professionals, hence they need:

- Autonomy
- Mastery
- Purpose

As leader you need to provide:

- Congruance
- Initiative
- Courage

Make sure that your team members are able and engaged