

Designing Teams That Work

Lauren C. Miller

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Salesforce stats

"Innovator of the
Decade"

Forbes

September
2016

FORTUNE
100
BEST
COMPANIES
TO WORK FOR
2017

2009 • 2010 • 2011
2012 • 2013 • 2014
2015 • 2016 • 2017

Forbes

The world's most
innovative companies

2011 • 2012 • 2013
2014 • 2015 • 2016

FORTUNE
500
2016

\$8.39

FY17 revenue

B
30K

employees

\$389B

in GDP impact
by 2020

2M

jobs created
by 2020

IDC

IDC White Paper, sponsored by Salesforce, "The
Salesforce Economy," August 2016



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About Me

Global Delivery Excellence, Salesforce

Focus on Learning & Change at Scale

Consulting 10+ years

Organizational Change & Development Blog

My Journey

Technical Project Management

Change Management

Design Thinking Methodology

User Experience in Learning & Development space

MS, Organizational Learning, Development & Change, NU
BS, Business & Entrepreneurship studies, UConn

Designing Teams That Work

1.

**Team design as an
accelerator of team
performance**

2.

**Three pillars of
team design**

3.

Teaming toolkit

Why do some teams fail?

“ I did all the work while they sat around and did nothing ”

“ He isn't invested in the company's success ”

“ He was a jerk ”

“ She did it her way and didn't care about us ”

“ She took all the credit for my work ”

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“ No one listened to my ideas ”

Fundamental Attribution Error

Our tendency to explain team behavior based on internal factors, such as personality or disposition ...

and to underestimate the influence that external factors, such as situation and context, have on a team's behavior.

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and to underestimate the influence that external factors, such as situation and context, have on a team's behavior.

It's not them. It's team design.

Accelerating Team Performance

Our job as Leaders is to **design** the team well so we can **accelerate** team performance.



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Teams, defined

1. Shared goal, shared deliverable
2. Interdependence
3. Bounded & stable
4. Authority to manage their own work & processes
5. Be part of a larger system or organization



3 Pillars of Team Design



Tasks

What work will the team do?



People

Who is suited to do the work?



Process

How will the team achieve their goal?



Tasks

What work will the team do?

**Make your goal
SMART**

**Define the
task type**

Clarify roles



Is my goal
clear and
specific?

Make your goal SMART

The goal should be...

- **Specific.** Identify a specific action or event that will take place.
- **Measurable.** Quantify the goal and its benefits.
- **Achievable.** Attainable given available resources.
- **Realistic.** Allow the likelihood of success with a little 'stretch'.
- **Timely.** State the time period in which it will be accomplished.

The goal should specify an ends but not a means.

Toolkit

- SMART goals worksheet

Source: Peter Drucker, George Duran

Toolkit : Tasks | Process | People

SMART goals

Ensure the team's goals are SMART.

Use the checklist below when articulating your goal.

- **Specific.** The goal should identify a specific action or event that will take place.
- **Measurable.** The goal and its benefits should be quantifiable.
- **Achievable.** The goal should be attainable given available resources.
- **Realistic.** The goal should require you to stretch, but allow the likelihood of success.
- **Timely.** The goal should state the time period in which it will be accomplished.



What type of
focus does the
task require?

Define the task type

Teams should have a primary focus defined.

- **Problem Solving Teams** : resolve problems on an ongoing basis
 - CDC, Tech Support team
 - Depend on trust, facts, and suspension of judgement
- **Tactical Teams** : execute on a well defined plan
 - ER team, baseball team, restaurant kitchen team
 - Depend on role clarity and accuracy
- **Creative Teams** : explore possibilities and alternatives
 - Media production team, home renovation team, innovation team
 - Depend on autonomy, free flows of ideation



Tasks

Who's doing
which tasks?

Clarify roles

When deciding # of team members, more \neq better

- Diminishing returns ; process losses
- As team size grows, more people do less talking

Don't confuse stakeholders with team members.

- Stakeholders have a stake in the outcome
- Team members are responsible for the work

Team member may have different role depending on task

Toolkit

- RACI

Toolkit : Tasks | Process | People

RACI task responsibility framework

Team members and stakeholders must be aligned on who is responsible for what.

- **Responsible** *team member(s) who is actually doing the task*
- **Accountable** *team member who is on the hook for accuracy and completeness (1)*
- **Consulted** *team member(s) or stakeholder(s) who have subject matter expertise*
- **Informed** *stakeholder who gets progress updates*

Task	Responsible	Accountable	Consulted	Informed
Primary research	John	Amy	Sara, Sanjeet	Robert
Stakeholder Interviews	John, Matt, Amy	Amy	Marie	Robert
Presentation outline	Kristin, Brad	Matt	John	Robert, Marie
Scheduling meetings	Tamira, John	Tamira	n/a	n/a



People

Who is suited to do the work?

**Ensure breadth
of skills**

**Choose
diversity**

**Build
cohesion**

Lead strategically



People

**Are all types
of skills
represented
on the team?**

Ensure breadth of skills

Ensure your team design is congruent and balanced with the type of task.

- Functional expertise
- Task-management skills
- Interpersonal skills



People

Is my team
diversified?

Choose diversity

Diversity often yields creativity, improved performance, accelerated innovation \Rightarrow competitive advantage

- Physical
- Values
- Social, Societal
- Occupational
- Relational
- Cognitive

Avoid faultlines by designing overlapping subgroups on a team





People

**How will the
team build
trust?**

Build cohesion

- Make it easy for the team to be close together
- Encourage a learning orientation by being briefed together
- Build psychological safety
- Provide retrospective opportunities
- If conflict arises, focus on similarities
- Minimize communication links

Toolkit

- Personal User Guide
- Create a team/initiative name, and use it

Toolkit : Tasks | Process | People

Personal User Guide

Have each team member fill out *and share* a Personal User Guide. Encourage the team to discuss similarities, gaps, and concerns openly *before* the work begins.

My background:

My expertise:

On a team, I like to contribute most by....
writing, sketching, presenting, organizing, researching...

On a team, I get anxious when....

The communication modes I prefer are:

When I am silent, that usually means...
I am in agreement, I am confused, I need more time to think, I am not in agreement....

My scheduling considerations are:

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Source: adapted from MSLOC Program, Northwestern University



People

**What is the
leader's role?**

Lead strategically

- Decide if you are a consultant, a coach, or a decision maker
- Celebrate and recognize involvement over superiority
- Balance accountability and psychological safety
- Tap into your emotional intelligence

Toolkit

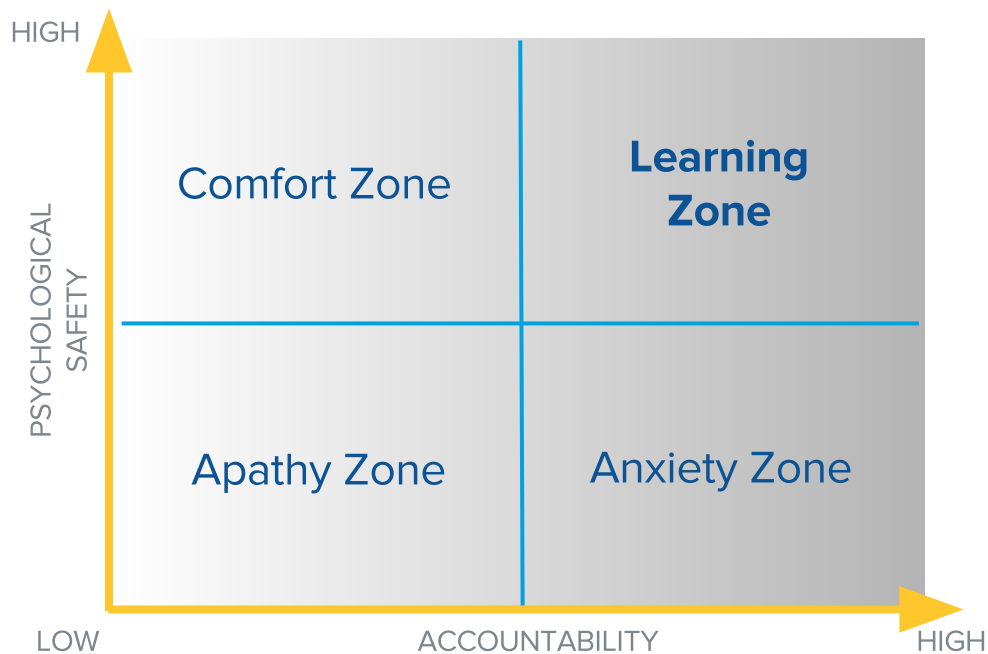
- Accountability / Psychological Safety Matrix
- SCARF model

Toolkit : Tasks | Process | People

Accountability / Psychological Safety Matrix

Gut check your leadership behaviors.

Where does your team lie now, and how can you get into the Learning Zone?



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Source: Amy Edmondson, "Teaming", 2012

Toolkit : Tasks | Process | People

SCARF model of human social behavior

Five human social domains that, if threatened, negatively influence teamwork and performance. As a leader, are you exhibiting threats to your team, either consciously or unconsciously?

- **Status** we don't want to be perceived as 'less than' someone
- **Certainty** large uncertainties about work debilitate some of us
- **Autonomy** we want the sensation of having a choice ; control
- **Relatedness** we rely on social connections for trust-building
- **Fairness** fair exchanges and rules are intrinsically rewarding

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Source: David Rock, 2008



Process

How will the team achieve their goal?

**Develop
norms**

**Remember
reflection**

**Rank rather
choose**

than



**How will the
team work
together?**

Develop norms

- Foundational roadmap on how to think, feel, act (cognitive, emotional, behavioral)
- Must be developed by team; not prescriptive
- Foster group identity, build psychological safety

Toolkit

- Team Charter
- Pre-Mortem

Toolkit : Tasks | Process | People

Team Charter

Create a team charter together as a group activity. Consider it a pact for how the team will think and act, and what the team will do if any team norms are broken.

Our team goals:

1. *Achieve our initiative with the time and resources allotted*
2. *Learn from each other*
- 3.

Our team guiding principles / values:

1. *We will ask questions if we are confused or not sure*
2. *We will respect each other's opinion and hear each other out*
- 3.

Our team operating principles:

1. *We will all be in attendance for meetings*
2. *We will assign a note taker for each meeting*
3. *We will keep communication flow open to all team members*
4. *We will meet weekly in-person*
5. *We will communicate via email, Chat, and Sharepoint*

Toolkit : Tasks | Process | People

Pre-Mortem

Create a Pre-Mortem together as a group activity before the work begins.
Adjust process to accommodate insights.

What would happen in order for us to consider this a team failure?

What might our obstacles be?

How might we mitigate those risks/obstacles before they happen?

On the last day of the project, we want to feel...



How will the
team learn
together?

Remember reflection

- Build reflection into your process
- Hold retrospectives after milestones
- “Double loop learning” -
 - reflect on WHAT you’re doing, and HOW you’re doing it
 - “Doing the things right” VS. “Doing the right things”

Toolkit

- Retrospective Starfish
- Team Report Card

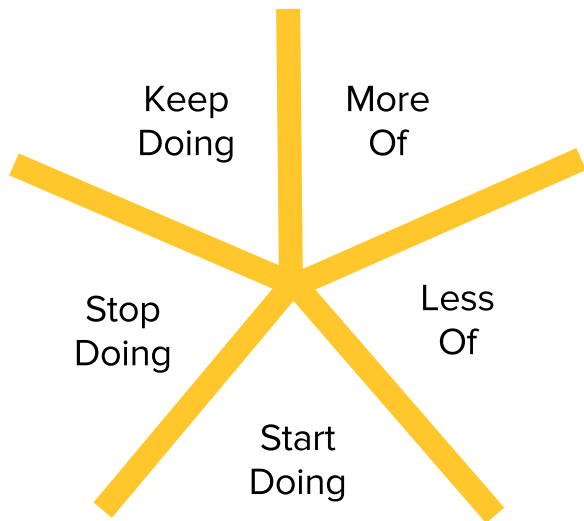
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Source: Chris Argyris

Toolkit : Tasks | Process | People

Retrospective Starfish

Everyone comes prepared with a few thoughts about the team's working process. Draw framework on whiteboard, people post sticky notes with their thoughts. Look for patterns, create discussion. Identify and document take-aways, actions, or solutions the team came up with. Use a neutral facilitator if needed.



Toolkit : Tasks | Process | People

Team Report Card

Have each team member complete a report card as part of the retrospective process. Have team members volunteer to share their thoughts.

Grade A - F

I give myself the following grade for my performance thus far:

I give my team the following grade for their overall performance thus far:

One thing I will be working on to improve:

One interesting thing I learned recently from a team member (tip, trick, soft skill, even something quirky about a teammate):



Process

**How will the
team make
decisions?**

Rank rather than choose

- Team decision making process
- Everyone ranks first, second, (third) choice instead of choosing 1
- Ideally rank individually first
- Takes pressure off Groupthink tendencies

The Salesforce logo, which consists of a blue cloud shape with the word "salesforce" in white lowercase letters inside it.

salesforce

Bringing it* all together: V2MOM



Tasks



Process



People

**most of it*

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Create focus and alignment with a V2MOM

Vision	What you want to achieve or accomplish. What impact it may have on your company, employees, customers, and community.
Values	The principles or beliefs that are most important to you as you pursue your Vision. Values guide every day decision making.
Methods	The actions and critical steps that you will take to achieve your Vision.
Obstacles	What may block or impede your progress. What you can do to proactively overcome them.
Measures	Measures tell you and others when you've successfully completed your Methods. They focus on the measureable outcomes of the work.

Our job as Leaders is to **design** the team well
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Toolkit for Team Design:



Tasks

SMART goals

RACI

Salesforce's V2MOM



People

Personal User Guide

Accountability/Psych Safety
Matrix

SCARF model



Process

Team Charter

Pre-Mortem

Retrospective Starfish

Team Report Card

Thank You

Get in touch, download the toolkit:

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