

Establishing Team Goals, Roles and Procedures

To be effective the team must establish clear and agreed-upon goals, roles, and procedures.



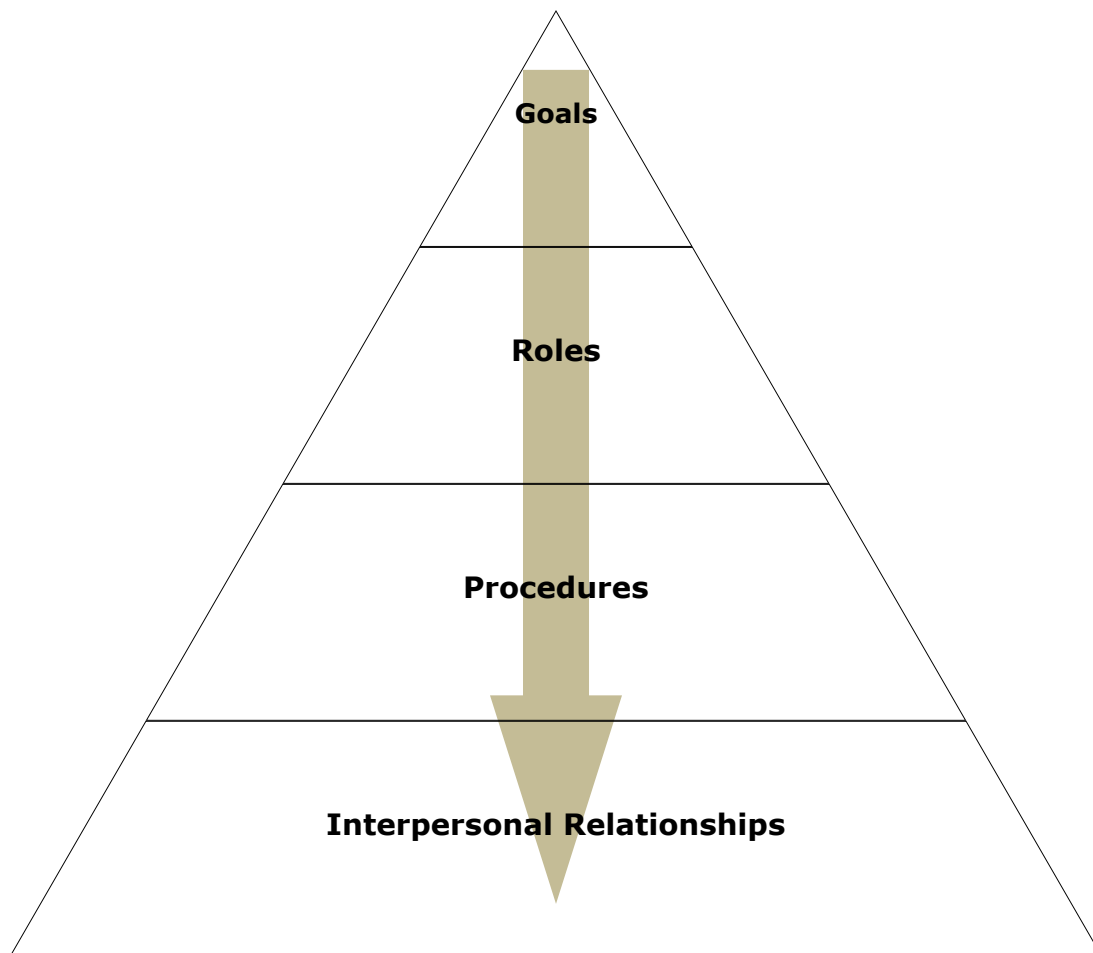
What to do:

The Goals, Roles, Procedures, Interpersonal Relationships (GRPI) Pyramid tells you that to establish an effective team, you should start at the top and work your way down:

1. First, make sure everyone understands and agrees on what goal the team is trying to achieve. You already started working on this in your first team meeting; *when you discussed steps 1 – 3 of High Performance Teams.*
2. Next, make sure everyone on the team has a role to play in achieving the goal. You made progress in the first team meeting when team members discussed how they could contribute to the project; *when you discussed steps 3 – 5 of High Performance Teams.*
3. Last, establish procedures that will help the team do its work. Some of these may have come up during your first team meeting, and you need to formalize them now; *Steps 4 – 6 of High Performance Teams.*

Refer to the GRPI Team Guidelines for more detail

Goals, Roles, Procedures Pyramid



Robin, Plovnick, and Fry, *Task-Oriented Project Development*

Guidelines: Establishing Project Team Goals

GOALS

Key Principle

If the team does not understand and agree on its goals, it cannot be effective even if the roles are clear, there are good working procedures, and the team members like each other.

Guidelines

- ❑ **Shared Vision:** Ensure all team members share the same vision of what will happen by the end of the project. *Refer to 'Planning a Change'*
- ❑ **Clarity:** Make sure the team's goals are clear and unambiguous to all members. *Refer to 'Goal-Setting & Time Span: QQT/R'*
- ❑ **Conflict Resolution:** Identify and resolve member goals that conflict with those of the team. Such conflict can happen when members try to minimize extra work, prefer the status quo to the team's goals, view the goals as unimportant, or believe achieving the goals will have a negative impact on them. *Refer to 'Is your data Persuasive?' and '5 Ways to Influence People to Cooperate With Your Team Project'*
- ❑ **Commitment:** Ensure team members feel they "own" the goals by involving them in the goal setting. *Refer to 'Coaching for Performance', 'Planning for Success' and Steps 1 - 4 of 'High Performance Teams'*

Guidelines: Establishing Project Team Roles

ROLES

Key Principle

If roles are not clear, the team cannot be effective even if members understand and agree upon Goals, there are good working procedures, and the team members like each other.

Guidelines

- ❑ **Clarity:** Ensure that team members accept their roles, know exactly what other members expect of them, and know what they can expect from other members. *Refer to 'Task Initiated vs. Task Assigned Roles Responsibilities'*
- ❑ **Conflict Resolution:** Identify and resolve conflicts members feel about their roles. Such conflict can happen when team members feel that it will be impossible for them to meet the team's expectations, or when they feel conflict between their other obligations and their role on the team. *Refer to 'Task Initiated Roles Responsibilities' and Step 5 of 'High Performance Teams'*
- ❑ **Roles to Consider:** Team Leader, meeting facilitator, timekeeper, scribe, recorder, and member. *Refer to 'Obtaining agreement on specific team roles and responsibilities'*

Guidelines: Establishing Project Team Procedures

Procedures

Key Principle

If the team does not have good working procedures, it cannot be effective even if members understand and agree upon the goals, roles are clear, and team members like each other.

Guidelines

- ❑ **Meeting Management:** Establish methods for preparing, conducting, and following up on team meetings. *Refer to 'Effective Team Meetings'*
- ❑ **Conflict Management:** Establish a way to deal effectively with conflicts among team members. *Refer to '10 Team Dynamics That Get Results', '10 Misconceptions About People at Work' and 'Dealing with Difficult Team Members'*
- ❑ **Decision Making:** Establish the most efficient way for the team to make high-quality decisions. *Refer to 'Decision Making: Facts & Intuition' and 'Decision Making Methods for Teams'*
- ❑ **Process:** Ensure that all members are familiar and knowledgeable with the process you are using for doing the actual work on the project. *This may vary according to kind of work being done and your industry.*

Guidelines: Establishing Project Team Interpersonal Relationships

Interpersonal Relationships

Key Principle

Interpersonal Relationships are seldom the root cause of problems on the team; usually, such problems are a result of insufficient attention to goals, roles, and procedures.

Guidelines

- ❑ Follow the guidelines above on goals, roles, and procedures.
- ❑ Follow the steps in *'High Performance Teams'* and *'Biggest First Team Meeting Successes and Mistakes'* to give participants a chance to establish themselves on the team.
- ❑ Refer to *'Levels of Intervention'* and *'Coaching Underperformance'* if team members' behavior becomes a problem.

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