Team mechanics
Day 2

ICG Consortium
eu management training

Contents

Overview of the programme

This course will provide insight and practice in the following subjects:

- Process optimisation, from identification to implementation
- Learning how to make "hidden" processes visible and how to measure, and then subsequently manage performance
- Basic cause-and-effect analysis methods to support effective idea generation
- Tools to select the vital and critical process elements to save time and effort while maintaining focus
- Process management tools to make day-to-day work easier, maintain control and improve team

Content of Day 2.

- Conscious thinking using the Cause and Effect analysis
- Defining sustainable, high impact solutions and project roadmaps for implementation
- Defining leader work plans to manage change with the team
- Visualising the team and process evolution progress.

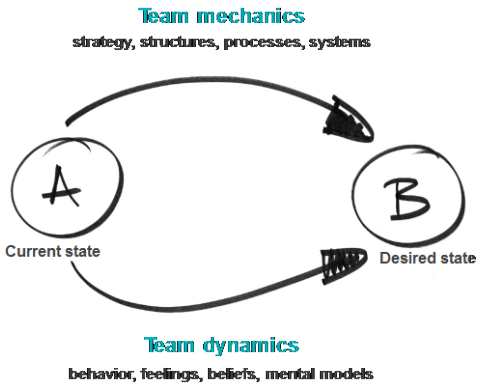
Expectation for the day

What do I expect from the programme? What should happen today?

What should we avoid? What should not happen today?

Recap Team mechanics

Every organization has a purpose. This purpose is achieved through processes. The processes are operated and managed by people. So to achieve purpose we have to manage both process and people. Furthermore, we have to align, engage and motivate our people with the purpose. That is the duty and challenge of managers and leaders.



The 4 phase of the 'Team Mechanics'

		Phase	Major steps	Purpose
Day 1	1	Owning the challenge	Understanding the necessity	Define the initial condition that frames the challenge, identify involved parties and the major objectives.
	2	Understanding the current state	Making processes visible Seeing the process performance Defining objectives	Collect and organise all relevant facts and figures about the current condition in order to have a common understanding in the team and with the involved parties
Day 2	3	Conscious thinking	Learning about cause and effect Defining countermeasures	Focus thinking on the cause and effect relation in order to have the best ideas to manage a challenging situation
	4	Pace of moving forward	Planning the roadmap Visual management for leaders	Create a plan for ideas on how to implement, with major milestones, and to make progress visible

Phase 3. Conscious thinking

Cause – and – Effect analysis

In order to create sustainable solutions, we need to remove real obstacles. Also, we need to clearly identify those obstacles that are in our zone of control. Jumping to conclusions risks us defining actions based on our assumptions not on the real causes or facts. This can lead to us taking actions where we do not get the expected outcome , while having spent our resources.

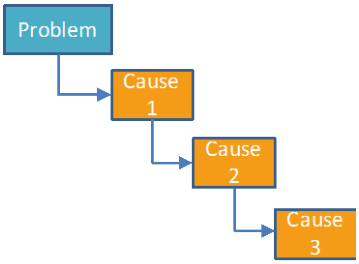
Therefore, we should ask ourselves and our team: "Why do we have process performance problems?". This approach will lead us to the real causes of these problems. When we have a better understanding of causes, we can define **actionable actions** with tangible results. (Actionable means that we can do real process changes within our zone of control.

Conscious thinking means that we continue with this systematic approach until we understand the underlying correlations. We will be able to understand these circumstances only if we observe the selected process, ask our team, and try to find evidence.

There are 2 models that can help us to focus our thinking:

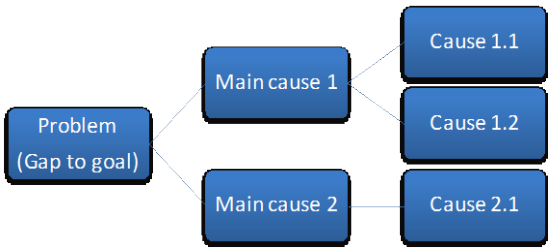
5 Whys

'5 Whys' is a systematic questioning tool to get to the potential causes of an issue.



1. Define clearly the issue (process performance problem or symptom).
2. Observe the process and answer the question: "Why does the problem occur?".
3. Repeat the question "Why?" after each answer in order to reach the real cause.

Cause and Effect tree



This method is used when there is more than one main cause. Use the 5Why technique for each main cause.

Cause – and – Effect diagram (Advanced analysis)

The Cause and Effect diagram is a simple graphical tool to represent potential and/or proven causes of an effect (defect, phenomenon).

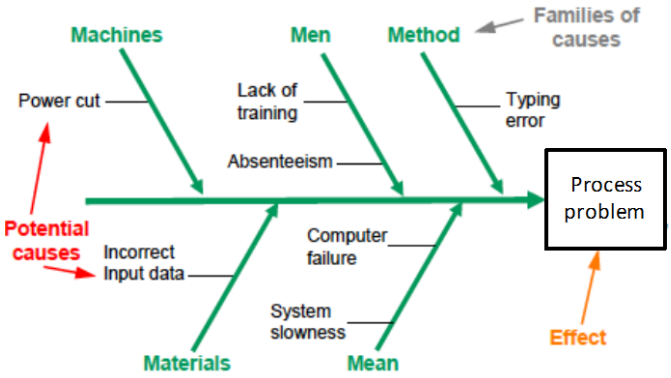
Causes can be classified into groups according to "5Ms":

Machines: work environment, IT system,

Men: team, other institutions, stakeholders, capability, skill, practice, etc.

Method: standards, procedures, instructions, habits, rules, behaviours

Means: information system, equipment, measurement system, …etc.



Materials: process input documents, computer data, papers, …

USE those Titles which are relevant to the situation. Rename each main "bone" according to your evaluation or circumstances.

Evaluation of causes

After having your causes, you can use the power of the team to select the vital few and start working on it. Available tools are:

- Benefit – Effort matrix
- Dot voting

Please check your personal challenge process diagnosis, performance or objective.

What are the main causes? Which one do you address now and why? What can be a "QUICK WIN"?

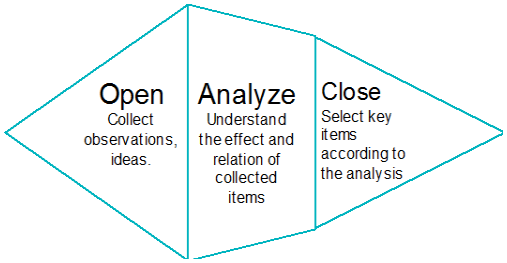
Defining countermeasures

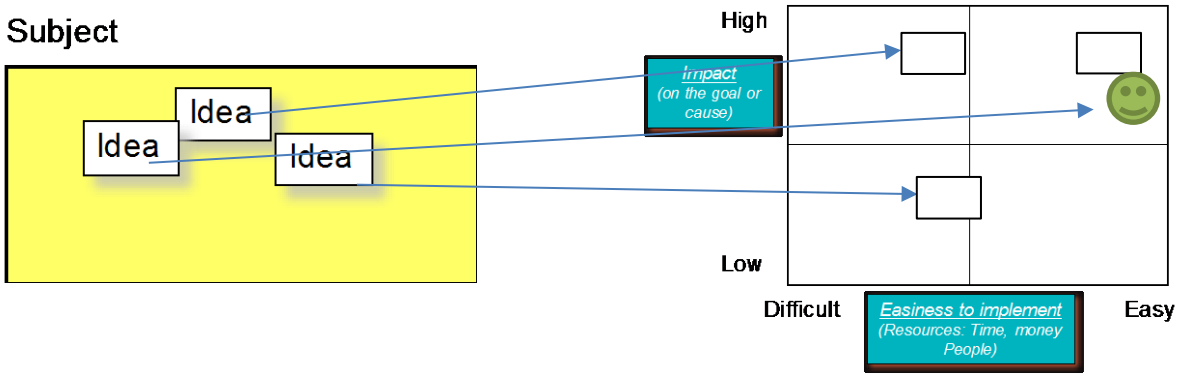
After having identified the main causes, you then develop actionable actions. An action is actionable if you are able to deliver the implementation on your own within your team or where the stakeholders are engaged to it and will support it.

Brainstorming

"Brainstorming" consists of generating ideas, in general as a group. It enables every participant to express his opinion in a safe environment.

1. Select the subject and make sure that everyone understands
2. Develop ideas individually
3. Collect ideas and share – Don't judge or evaluate
4. Discuss each idea – generate more or combine
5. Select the ideas and translate to actions





Select those ideas first where you can start implementation immediately. Create plans for those where you have to involve others and where the implementation is difficult, but there is a chance of a high benefit.

Scaling Impact and Easiness to implement

Impact is high where you are able to eliminate the cause or reduce it significantly and where the process performance improves significantly. The level of 'Easiness of implementation' is considered low where the action needs external approval, IT system change or high investment (or still complex). A high level of easy to implement is if you and your team can start tomorrow.

Process design

You will need to define the new process that you will operate after implementing the ideas. This "to be" process map also helps you to evaluate your progress and adjust the actions if needed to achieve the desired state.

Project plan

Implementation of actions need a plan and progress check. You need to cover the What, Who, When questions as well as the Tracking. The Project plan or Gant chart is a good tool for this. It will show the series of steps from the idea generation to validation of effect. This plan has to be a "living" document.

It is even better if you post it to the wall of your office and use in team meetings to check progress, adjust if needed, engage the team and get feedback.

Countermeasure / idea	Action	Responsible	Due date	Status / progress	J	F	M	A	M	J	J	A	S	O	N	D
Countermeasure 1	Action 1	Responsible 1	*Date 1*	*In progress*												
	Action 2	Responsible 2	*Date 2*	*Not started*												
Countermeasure 2	Action 1	Responsible 3	*Date 3*	*Closed*												

Progressing well
In delay or at risk
Done and works well

Please generate ideas from your selected causes and evaluate them using the Benefit / Effort matrix. Select the number one priority and create a Project plan for it.

List of ideas:

1

2

3

4

5

6

7

8

9

10

Please evaluate your ideas / countermeasures using the Benefit / Effort matrix.

Select the number one action and plan the series of steps to be done and create a Project plan.

Countermeasure / idea	Action	Responsible	Due date	Status / progress	J	A	S	O	N	D

Phase 4 Pace of moving forward

Engaging team by Project management

People will follow you if they are clear about the objectives, they are listened to, involved, empowered and can contribute to the success. This requires new routines in your daily management that will allow you to lead your people through the challenge from start to celebration.

You, as leader, have to find out what is the best way to lead your team through this project. Thinking about the following questions can support you:

1. How and when will you involve them in the project?
2. What will you communicate and when? (to each stakeholder)
3. How will you mobilise them?
4. How often will you meet your team to discuss the project status? (frequency, day, duration, place, etc.)
5. What will be your agenda for that event?
6. How will you share the actual status of actions?
7. How will you track progress of the ….
   ….Project plan
   ….Team engagement

Follow-up progress

In order to see if your actions has an impact on your challenge, you have to measure and follow-up the results. You have to use the process metrics defined in the "Understanding the Current state phase". The follow-up will create the opportunity to develop deeper understanding about the nature of the process and identify new actions to move forward.

The follow-up has to be regular when the team reflect on the progress.

Visual project progress

Visualisation of the storyboard of your challenge will help to engage your team and organise your activities. Also, it will give you a clear picture about your progress. This enables you to act if anything is off-track. Every challenge is situational, so your visualisation should be situational.

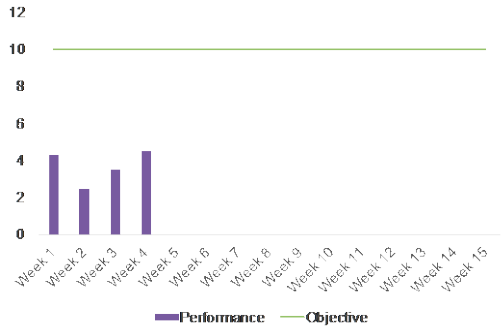
Creating the Storyboard can be a good exercise to involve your team in.

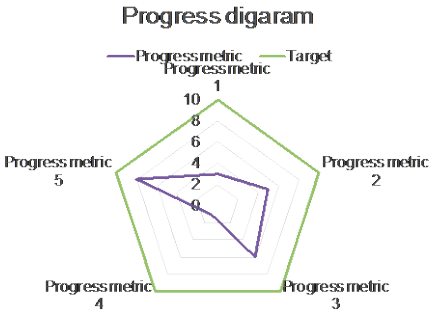
Elements of a visual project board (example):

1. Project charter
2. 'As is' process map highlights the key pain point after process diagnosis
3. Process performance metrics
4. Objectives
5. Cause – and – Effect diagram
6. 'To be' process

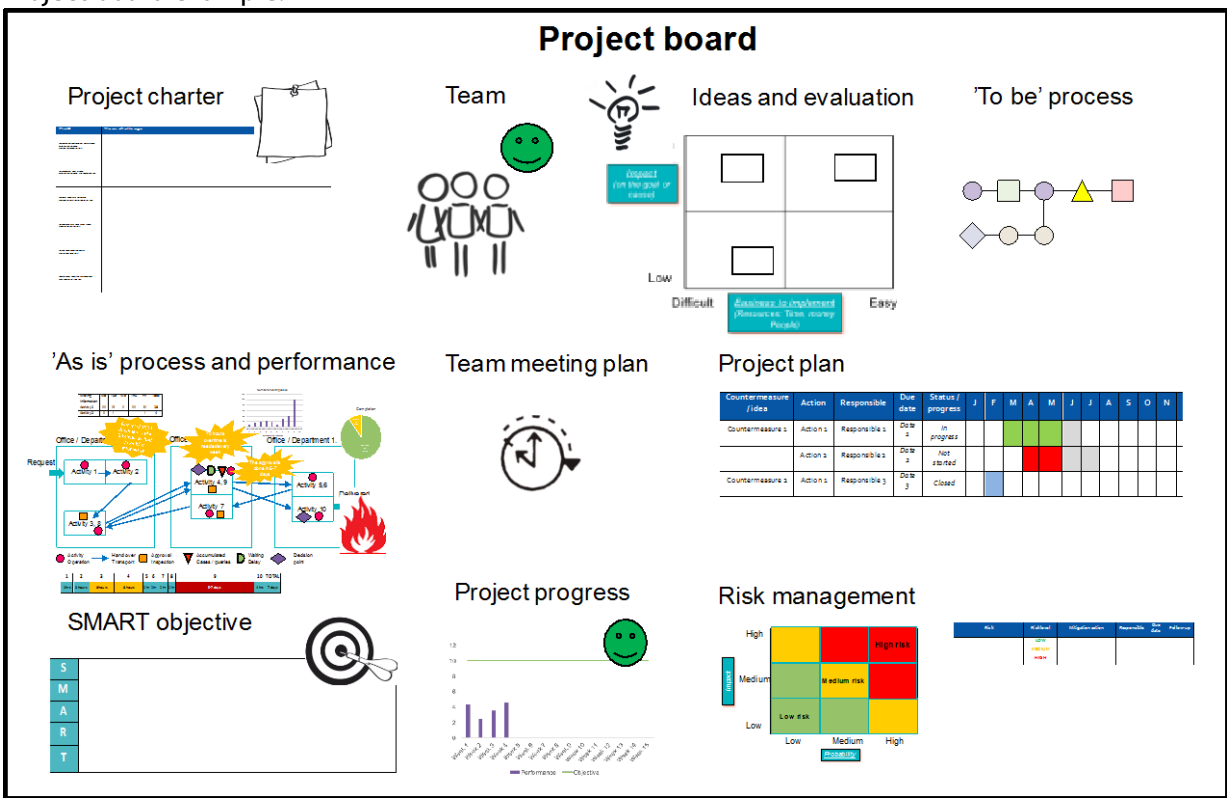
7. Ideas
8. List of actions / Project plan showing progress
9. Current performance metrics or progress
10. Risk management

Progress board examples:





Project board example:



Engaging Teams

Please plan your leader's journey. Think your challenge through and develop a plan that will help you in engaging your team:

How and when will you involve them into the project?

What will you communicate and when?

How will you mobilise them?

How often will you meet your team to discuss the project status? (frequency, day, duration, place, etc.)

How will you track progress of the ….

….Project plan

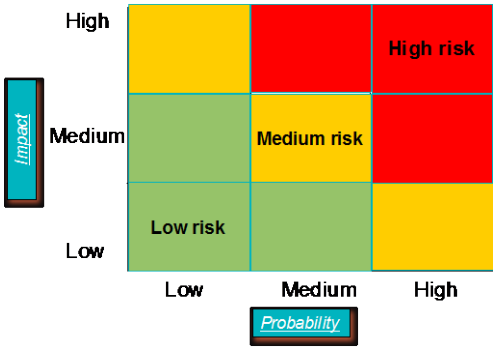
….Team engagement

Risk management

When we plan a new process and project, we are very often faced with risks that affect the implementation. E.g. long approval times, dependence from other teams, etc. In order to minimise these risks, we have to manage them consciously. The first step is risk evaluation then development of a monitoring system and mitigation actions.

1. Collect risks
2. Evaluate them with the team using the Risk matrix
3. Define priority order
4. Develop mitigation actions to reduce risk

   High risk – Immediate action
   Medium risk – Monitoring is needed
   Low risk – Be aware of



Risk management plan

Risk	Risk level	Mitigation action	Responsible	Due date	Follow-up
	LOW MEDIUM HIGH				

Please think about potential risks and evaluate them. Define mitigation actions for the highest risk.

1.
2.
3.
4.
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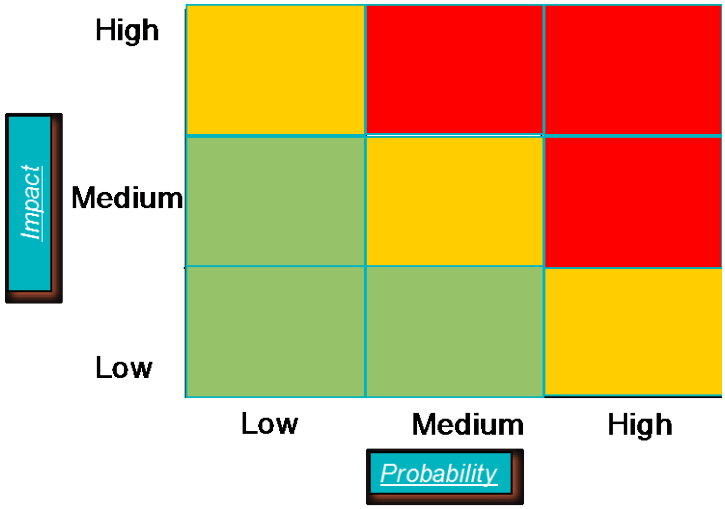
8.
9.

Risk evaluation and mitigation plan



Risk	Risk level	Mitigation action	Responsible	Due date	Follow-up

Course Summary

What did you learn during this exercise? How have you benefitted?

What would you like to know? What is your question, concern?

My learning partner:

I ask for help from my learning partner in the following:

I provide help to my learning partner in the following:

Our next meeting is:

My key learning points	How will I apply these in my work?