

# Team mechanics

## Day 1



# Contents

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<b>OVERVIEW OF THE PROGRAMME.....</b>	<b>3</b>
Content of Day 1 .....	3
Expectation for this programme .....	3
<b>INTRODUCTION TO TEAM MECHANICS .....</b>	<b>4</b>
The 4 phases of the ‘Team Mechanics’ .....	4
<b>PHASE 1 – OWNING THE CHALLENGE.....</b>	<b>5</b>
Challenge definition .....	5
Project Charter thinking .....	5
“Owning the challenge” – Summary .....	9
<b>PHASE 2 – UNDERSTANDING THE CURRENT STATE .....</b>	<b>10</b>
Making processes visible .....	10
“Making processes visible” – Summary.....	12
<b>Process performance and process diagnosis .....</b>	<b>13</b>
Process diagnosis – 7 check.....	13
Process performance .....	13
Visual analysis .....	14
“See the process performance” – Summary .....	16
<b>DEFINING OBJECTIVES.....</b>	<b>17</b>
Setting priorities .....	17
SMART objective .....	17
“Define objectives” – Summary .....	19
My learning partner: .....	20

## Overview of the programme

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

- 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 performance

### Content of Day 1

- A systematic thinking process for dealing with process and team challenges
- Using a "project charter" to focus efforts while engaging all relevant parties
- Making processes visible "learning to see" exercise supported by basic process mapping techniques
- Visualising the process performance, learning how to use basic data analysis to create common understanding
- Defining objectives, basic prioritization techniques

### Expectation for this programme

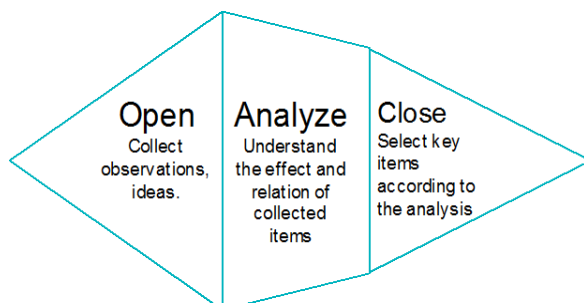
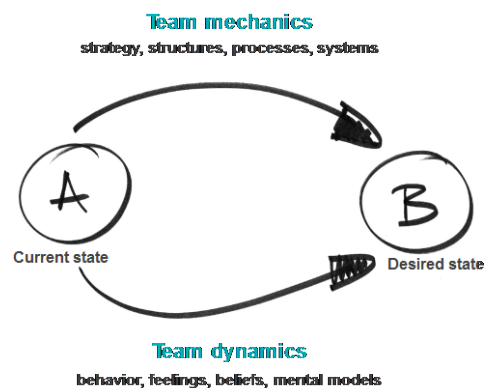
What do I expect from the programme? What should happen during this day?

What should we avoid? What should not happen during this day?

## Introduction to 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.

In order to move forward, we have to balance the 'Team dynamics' and 'Team mechanics'. This module is about 'Team mechanics', but every aspect should be linked to the team performance as well.



This course will use the divergent-convergent thinking model and takes you through the four main steps in this focused process.

### The 4 phases of the 'Team Mechanics'

	Phase	Major steps	Purpose
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
3	Conscious thinking	Learning about cause and effect Defining countermeasures	Focus thinking on the cause and effect relation by analysis 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 1 – Owning the challenge

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### Challenge definition

When we work and spend time on different activities in order to achieve our own or our organisation's purpose, we have to manage challenging situations. Our purpose is to select the key points and get good results within a short period of time, instead of jumping into a massive resource consuming activity with an uncertain, long-term result. The first step is to be clear about the background of our challenge.

### Project Charter thinking

The Project charter thinking will frame the challenge and create good understanding about "why do we need to do this". Project charter will provide good input to the communication and will support the team dynamics as well.

PURPOSE	Background of the challenge
FOCUS	Scope of the challenge
COST/ BENEFIT	Business Case
METRICS	Process baseline
PEOPLE	Stakeholders
TIMELINE	Major milestones

## Project Charter

Field	Purpose	Questions to answer	Example
Background of the challenge (PURPOSE)	We collect data and view the current situation from a higher perspective, briefly describing the rationale behind our planned activities. This explains the context and the reasons why the project is important.	<p>What is driving us to manage this challenge?</p> <p>What are the early observations that make the challenge important?</p> <p>What are the risks of not addressing the issue?</p> <p>Why is it so important to do it now?</p> <p>How does this fit with our priorities?</p>	<i>The current operation has feedback from the stakeholders that in 10 out of 100 cases the due date is missed and this causes extra effort on the receiving side (overtime). Recent changes require 100% matching of due dates, otherwise the risk of further delays will increase costs.</i>
Scope of the challenge (FOCUS)	In order to be effective during our activities, we have to be focused. This field will help us to define the boundaries of our activities.	<p>What processes / activities are part of the challenge?</p> <p>What is the starting point?</p> <p>What is the end point?</p> <p>What is not targeted by this challenge? (out of scope)</p>	<p><i>The focus of the process is from receiving the request to generating and sending the closing document.</i></p> <p><i>The IT system is not in scope.</i></p>
Business Case (COST/ BENEFIT)	This point will describe the objective of the activity and potential cost, in order to be realistic about our challenge.	<p>What will be the result of managing this challenge?</p> <p>What will we gain?</p> <p>What is the expected benefit?</p> <p>What is the maximum cost or effort that should be spent?</p>	<p><i>The deliverable of the project will be 100% on time with the same resource used.</i></p> <p><i>10% of the team time will be allocated to manage this challenge.</i></p>
Process baseline (METRICS)	This information refers to the first observations of the challenge. If available, this field can quantify the initial condition.	<p>What could be the best metric to describe the background of the challenge? (e.g. feedback, observations, etc.)</p>	<i>The current feedback from the parties shows that certain cases are delayed (more than 10 days) and this causes 100 hours overtime a month at the receiving institute.</i>
Stakeholders (PEOPLE)	This will define who the key participants in the challenge are and what their contribution / role (not position) is.	<p>Who are the internal / external parties most affected by this challenge?</p> <p>Who is giving inputs?</p> <p>Who is receiving the outcome?</p> <p>Who is acting in the process?</p> <p>Who is responsible for the outcome?</p> <p>What is their influence on the challenge?</p> <p>Who will be in our team targeting the challenge?</p>	<p><i>Requestor – sending the request</i></p> <p><i>Team – processing and creating the closing document</i></p> <p><i>Receiver – receiving the result of the process</i></p> <p><i>Manager – leading the team and accountable for the outcome</i></p> <p><i>Institute 1 – providing inputs to the process</i></p> <p><i>Institute 2 – has to align its resources to manage delays</i></p> <p><i>Manager of Institute 1- will approve any change in the process</i></p>
Major milestones (TIMELINE)	In this section we can define the timeframe of managing the challenge. This can derive from the situation (internal or external) or we can define it to focus our activities.	<p>When do we start?</p> <p>What is the expected end date?</p> <p>What are the major milestones?</p>	<i>The start of this project @ 1st of May, planned close is 1st of September</i>

Field	Your challenge
Background of the challenge (PURPOSE)	
Scope of the challenge (FOCUS)	
Business Case (COST/ BENEFIT)	
Process baseline (METRICS)	
Stakeholders (PEOPLE)	
Major milestones (TIMELINE)	

### Stakeholder management

Working through challenges requires a lot of discussion within our teams and with other related parties who are linked to our challenge. We call these parties "stakeholders". In order to create a great coalition and engage everyone, we have to understand their interest or influence in two ways:

- clarify their roles, experience and needs relating to the challenge
- create the best case where everyone benefits and then communicate this to them

The following simple exercise can help to acquire this information at the beginning of the process:

Stakeholder	Role in the challenge	Interest / influence	Communication
Name and position	What does he/she do? (e.g. receives information, approval, reporting, give information, etc.)	What does this stakeholder need the process to deliver or contribute to? How can this stakeholder influence the actions of managing the challenge?	How will you receive information about the challenge case work? How is he/she involved?

Who are your main stakeholders?

Stakeholder	Role in the challenge	Interest / influence	Communication



## “Owning the challenge” – Summary

What did you learn during this exercise?

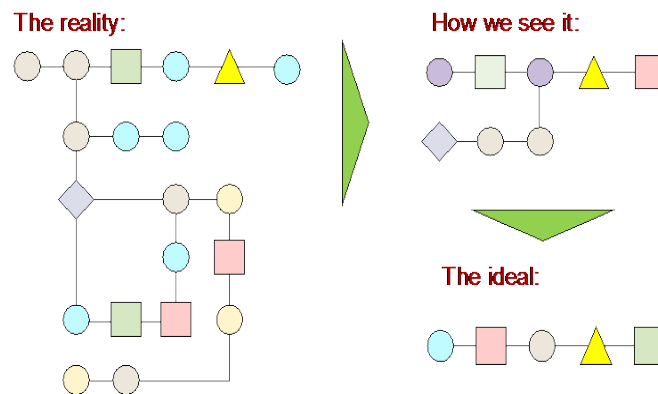
What would you like to know? What is your question, concern?

## Phase 2 – Understanding the current state

The purpose of the “Understanding the current state” phase is to get the best possible picture of the challenge including all inputs from the stakeholders in order to select the key, critical points for improvement and identify the real objectives.

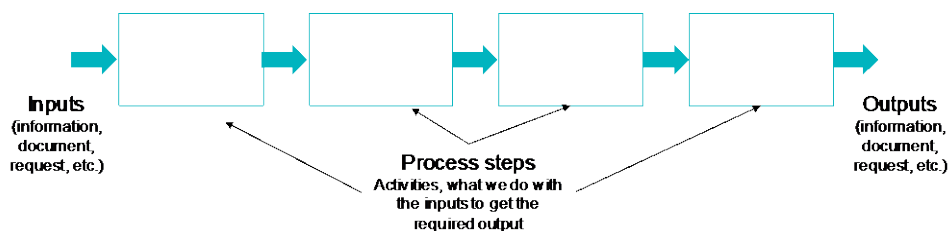
Without understanding what the real challenge is it is very hard to immediately find the right actions to manage the situation. Equally, all the stakeholders have to see the same picture to create consensus. Very often we call this the “learning to see” exercise, because we have an image of how things are working, but this is not equal to how things really work. Using our first impression to describe activities very often won’t guarantee the expected outcome, because our view does not reflect the complex reality. And processes rarely stop at the boundary of our office or department. To be on the same page with the other related parties we have to make visible what is not yet seen.

Every process exists in at least 3 different versions.

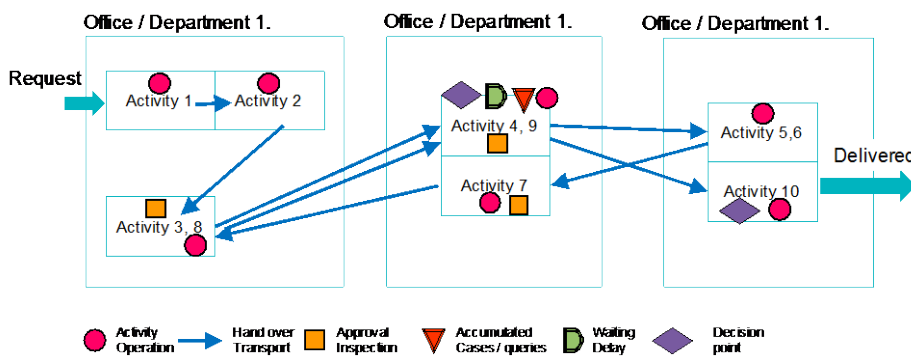


## Making processes visible

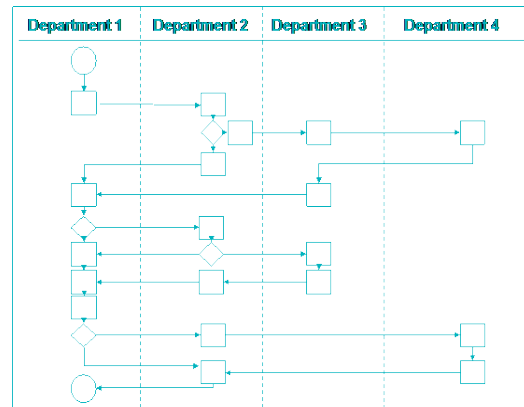
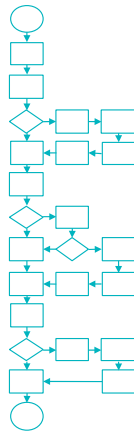
High level process map



Flow diagram



## Flowchart



### How to create a process map?

Ideally this is done in a group, to develop a consensus about the process 'as is' operation. It is also possible to do it through individual interviews, but sharing is required to achieve a common understanding with the stakeholders.

1. Explain the objective of the exercise (visualising the process 'as is' today, restricted to the limits of the process, not analysing it immediately, not trying to generate ideas about solutions)
2. Identify / collect all steps of the process, use post-its
3. Consolidate and clarify different process steps
4. Organise process steps in order (chronological flow)
5. Draw the map with the flow arrow (at each decision point there is only one 'Yes' and one 'No')
6. Go through and check logically and validate. Correct if needed.

### Questions that help define the current state

Type	Question	Description
Nature of Task	What?	What does the task achieve?
Objective	Why?	Why is it done?
Place	Where?	Where is the task done?
Sequence	When?	When is the best time to perform the task?
Personnel	Who?	Who performs the task?
Method	How?	How is the task performed?
Quantity	How Much?	How can you quantify at present?

What is the process that contributes to your challenge? Please draw a map – stay high level.

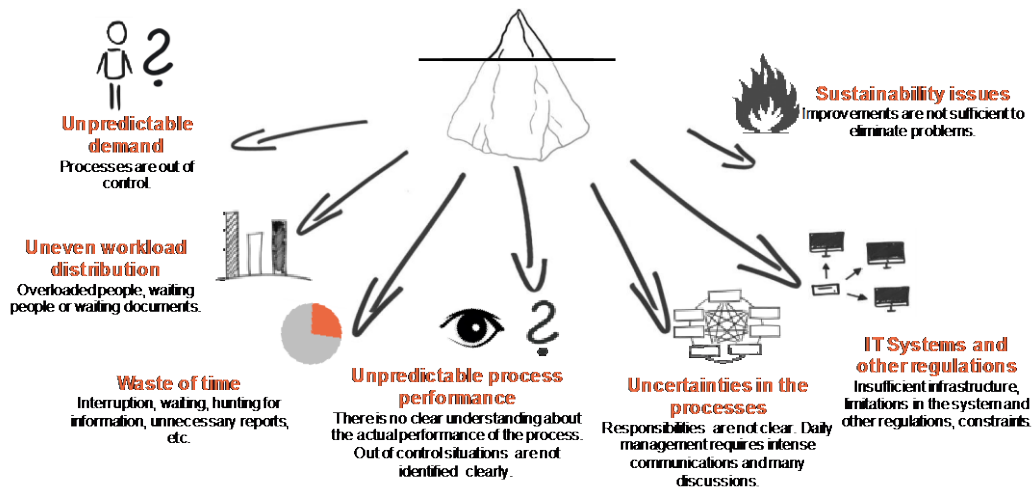
## “Making processes visible” – Summary

What did you learn during this exercise?

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

# Process performance and process diagnosis

## Process diagnosis – 7 check



Using the map and the team understanding you will be able to define the key elements of the process that really contribute to the challenge. We focus on a few vital things for two reasons:

- We have to focus our efforts
- Only a few key items cause the majority of the challenges (known as Pareto or 80/20 rule)

## Process performance

To move from the current condition to a desired, better state, we need to understand clearly where we are. Of course, which state we desire is up to us and depends on our challenge. But how can we be sure that we have achieved it or at least got close?

S	Safety / Legal risk – major risks e.g. compliance with a regulation, penalties, operational risk, etc.
Q	Quality performance – e.g. missing information, incorrect content that needs to be investigated, corrected forms, etc.
D	Delivery performance – e.g. long waiting times for information, overloaded staff, not meeting deadlines, etc.
C	Cost of process – e.g. spending on the process, cost of forms, post, etc.
E	Employee satisfaction – e.g. turnover, voice of the employee, complaints about a specific step, etc.

## Visual analysis

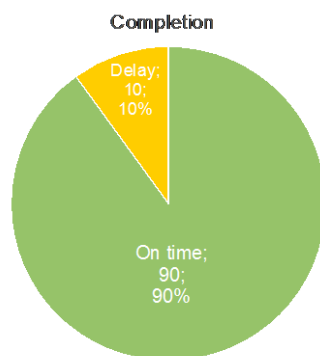
### 1) Check sheet

	Mo	Tue	We	Th	Fr	sum
Activity 1	IIII	IIII	II	IIII	IIII	18
Activity 2	II	I			I	4

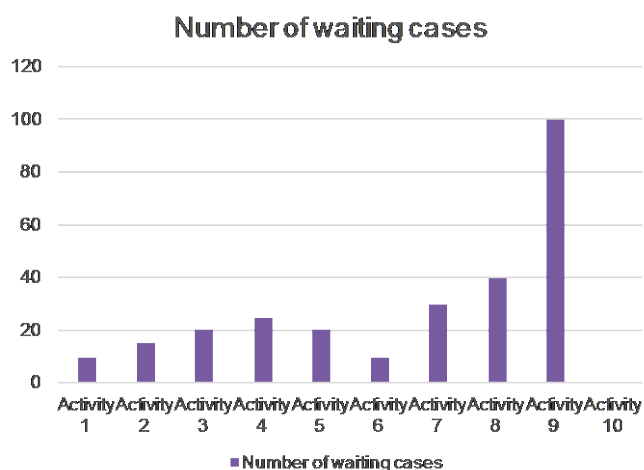
### 2) Time lane (lead times from start to end for each activity in hours and days)

1	2	3	4	5	6	7	8	9	10	TOTAL
2 hrs	3 hours	8 hours	8 hours	1 hr	1 hr	1 hr	1 hr	5-7 days	4 hrs	7 days

### 3) Pie chart



### 4) Bar chart



What is the diagnosis of your process? Please use the 7 Check on page 14.

What is the performance of your process?

Process performance indicator	How will you measure it?	What is the baseline?

How would you visualize your process performance? (think about the way of visualization, the "numbers" are not important yet.)

## “See the process performance” – Summary

What did you learn during this exercise?

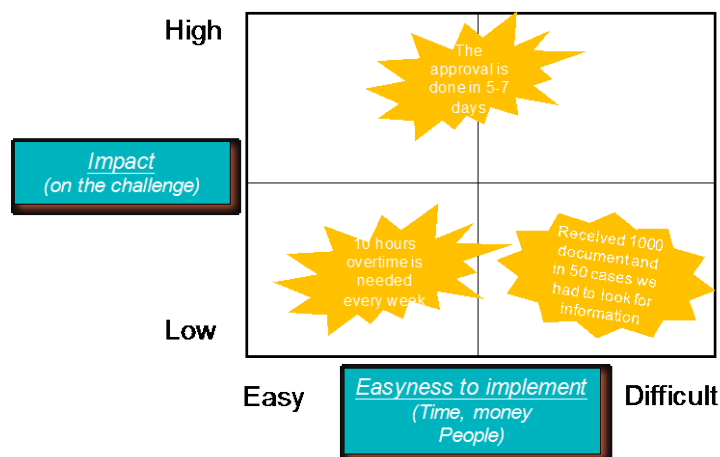
What would you like to know? What is your question, concern?



## Defining objectives

### Setting priorities

In order to select the vital few elements out of the useful many, we have to use our divergent-convergent thinking again. We have collected all the available information, so now it is time to use some analysis tools to select our priorities.



### SMART objective

To focus our way of thinking clearly, we need a good goal setting system in consensus with the team. This will focus and drive our efforts, as well as measure our progress in managing our challenge.

S	<b>Specific</b> Describe clearly the who, when, where, what and why dimensions. Use verbs.	An example: We will reduce the lead-time of the 9 <sup>th</sup> activity from 5-7 days to maximum 2 days in the process to deliver the cases 100% on time until end of June.
M	<b>Measurable</b> This will show the progress compared to the baseline	
A	<b>Achievable</b> Important that the challenge is in our control. This is where the effort / benefit matrix helps.	
R	<b>Relevant</b> Targeting our challenge will provide the maximum benefit. This is where the effort / benefit matrix helps.	
T	<b>Time bounded</b> This will give us a frame for our activities and link actions to our higher level challenge. We can also check our progress.	

What are your priorities? Please check your process map, diagnosis and performance above and fill up the Benefit – Effort matrix.


What is your Goal? What do you really want to achieve by the end of the Team mechanics?

## “Define objectives” – Summary

What did you learn during this exercise?

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?