Sample Teambuilding Proposal

MBTI Raw Scores are better!

	E	I	S	N	T	F	J	P
Rob	21	5	2	21	2	17	1	30
Stephen	8	18	16	12	13	14	26	3

Six Stages of Creating Supportive Agreements

- I understand you
- I acknowledge common points
- You understand me
- You acknowledge common points
- We clarify differences
- We create supportive agreements

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To

Your Organization

From

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PROPOSAL OUTLINE

OVERVIEW

It's Fun, But Is It Teambuilding?
Many organizations think of "teambuilding" as an afternoon at the ballpark or a day on a ROPES course. But the people return to work and deal with the same old stuff because nothing changed in the way team members work and relate. Such activities may be fun, but they are not teambuilding. Fortunately, it is possible to actually have fun and still deal with the real stuff at the same time.

Key – A Design Based on Unique Needs Identified by Team Members
A successful teambuilding experience must be customized to directly address the current dynamics, concerns and challenges a team faces. Although many teams have common dynamics, each team has unique strengths, weaknesses, and opportunities for improvement. Some teams need to build goals and project plans from the beginning; others may need an emphasis on resolving disagreements between team members; while other teams may benefit from maximizing hidden potential or preparing for upcoming changes.

Customized Design
To design a customized experience, the consultant must have a wide range of models and techniques in fields of leadership, decision-making, goal setting, problem solving, project management, communication, conflict resolution, and stress and change management. The challenge is to pick and choose which of these general tools are appropriate for a particular team's needs.

To customize effectively, the consultant must listen to team members and leaders, create interactive experiences that allow the team to deal with real work issues, and facilitate discussion of how work will be done differently to make a positive impact. To accomplish this, RI consultants have developed a multi-phased approach.

A Four-Phase Approach
The following pages outline a four-phase approach that includes Diagnosis, Training, Team Building, and Coaching. At the end of each phase, RI consultants work with the Team Lead, using feedback from team members to reevaluate and consider what is needed in the next phase. This next phase would then be approved and implemented. In this way the team repeatedly reflects upon progress and takes responsibility to contribute to teambuilding design.

The highest functioning teams are those that constructively discuss their own functioning. Therefore, based upon the team's progress through the phases of team building, the Team Lead decides at the end of each phase and with the recommendations of RI consultants, whether <u>or not</u> there is a need to continue to the next phase.

FOUR PHASES OF DEVELOPING TEAM LEADERSHIP

PHASE ONE   DIAGNOSIS
    Description: **Phase One involves**
    1. Individual, confidential interviews with each team member.
    2. Anonymous Internet accessed survey completed by each team member.
    3. Assessment Instruments, e.g, MBTI, Team Dimensions Profile
    4. Consultation and customization with the team lead.
    5. A report, based on the survey, to be shared with all team members.

PHASE TWO   TRAINING
    Description: Phase Two typically involves presentation of models and
    processes for understanding:
    1. Differences in individual style.
    2. Individual and team decision-making and problem solving.
    3. Resolving misunderstandings and disagreements.
    4. Processes for how to communicate effectively.
    5. Group application of these models to challenging circumstances, and
    6. Individualized training, role-playing and coaching to validate the
       integration of concepts.
    7. Meetings with CEO and key team members, and a report with
       recommendations on how to focus the upcoming teambuilding retreat on
       current strategic objectives.

PHASE THREE   TEAM BUILDING WORK SESSION
    Description: Phase Three typically involves
    1. Interviews with key team members to prepare for the retreat.
    2. Two-day team building retreat, working together in developing leadership
       potential, while focusing on strategic objectives.
    3. Report to summarize the follow-up action steps that relate to leadership
       development which were generated during the retreat.

PHASE FOUR   COACHING
    Description: Phase Two typically involves
    1. Individual coaching sessions.
    2. Setting and monitoring leadership performance development goals.
    3. "Surgical strikes" – guidance in applying techniques and models to the
       current critical work project challenges.
    4. Explore with each VP the possibilities of taking his business unit's team
       through the Phases One- Four of the leadership development.

The following pages describe in more depth what is included in each of these
four phases.

PHASE ONE: DIAGNOSIS

To have a successful team building program that really "rings the bell," participants need to see that whatever is being planned is based upon their perceived needs. *Phase One: Diagnosis*, is designed to ask this of each participant of the team, before any training/team building design is proposed.

To this end, confidential individual interviews with each participant are highly valuable. Experience shows these individual interviews simultaneously accomplish a number of important goals:

1. Educates RI consultants as to participants' perceived concerns related to the team's goals, their prior experience with team building, and those priorities which individual team members believe are greatest.
2. Begins the process of building a necessary level of trust with consultants so that participants see that consultants can speak directly to their stated concerns as well as laying a strong foundation should mediation of conflicts be required at a later date.
3. Increases motivation to share the responsibility to make the proposed team-building program realistic and relevant.

The conceptual model RI uses, the Concerns Based Adoption Model, predicts that team members will have concerns about Self (how does all this affect me?), concerns about Task (what will I be expected to do?) and concerns about Impact (what difference will it really make?). Most training/ interventions only address the Task concerns. RI's individual interviews are structured to address each of these concerns in relation to the challenge of building a cohesive work team with a diverse group of individuals.

Based on the confidential individual interviews a survey questionnaire is developed which gives the team an opportunity to diagnosis itself. <u>The results are not what management says is needed, nor what the consultants say is needed, but what the team members themselves say is needed</u>. The training, support, and team building are then designed to address the issues identified in the survey questionnaire. A sample questionnaire can be accessed at: http://www.resource-i.com/RISampleSurveyLink.html

Relevant assessment instruments, such as the Team Dimension Report, provide valuable insights into the Team's strengths and weakness in the basic team skills of creating, analyzing, refining and executing.

> **Description**: **Phase One involves**
> 1. Individual, confidential interviews with each team member.
> 2. Anonymous Internet accessed survey completed by each team member.
> 3. Assessment Instruments, i.e., Team Dimensions Profile
> 4. Consultation and customization with the team lead.
> 5. A report, based on the survey, to be shared with all team members.

PHASE TWO: TRAINING

For any team building to be effective, participants must be able to address real issues within the team. This can be risky, because hardly anyone grew up in a family where, when there was a disagreement or conflict, they ended up closer. Most people find it very uncomfortable with deal openly with disagreements, whether at home or at work.

RI has developed a set of models that provide a team with the necessary skill and knowledge to create an environment in which it is safe to disagree respectfully and effectively. This is the essence of a highly functioning team.

The best way to begin a new project is to establish a commonly understood methodology to reduce misunderstandings, resolve conflicts, solve problems and make decisions - together. The *Phase Two: Training* is designed to provide a set of commonly understood tools and techniques. In *Phase Three: Team Building*, these tools and techniques are put into practice on real work issues. But first they must be learned and understood. A key to success is that everyone knows that all members will be accountable for using these tools and techniques, especially the leadership

> **Description:** Phase Two typically involves presentation of models and processes for understanding:
> 5. Differences in individual style,
> 6. Individual and team decision making,
> 7. Resolving misunderstandings and disagreements,
> 8. Processes for how to communicate effectively.
> 9. Group application of these models to challenging circumstances, and
> 10. Individualized training, role-playing and coaching to validate the integration of concepts.

Training would be provided by both live on-site sessions, by web-based trainings as well as supported by audiotapes and CDs, and laminated reminder cards.

Sample web based trainings can be accessed at each of these links:
      An Introduction to "Successfully Managing the Stress of Change"
      An Overview of RI's Communication Models.

PHASE THREE: TEAMBUILDING WORK SESSIONS

Phase Three involves applying the models learned in Phase Two to make decisions concerning the work of the team. This could include various decision-making methods, problem solving models, models for evaluating performance, and how to successfully address issues related to team functioning. RI's team building programs are based on the team doing "the work of the team" during the teambuilding program, together with guidance and facilitation. Rarely are simulations used, unless specifically indicated. RI prefers to assist the team in implementing and using the models and tools presented in Phase Two to do the actual work of the team.

Too often participants attend theoretical team building courses, and then leave the theory aside when they refocus on the tasks before them. Making the 'back home' application practical and realistic is specifically what will be addressed in Phase Three - how to balance maintenance of tasks with team relationships as an ongoing aspect of the work.

Description: Activities of the teambuilding within Phase Three evolve out of the needs of the team at the time of the program. Whatever topics are being addressed at work, the team building sessions provide a structured, facilitated approach to applying the tools and techniques learned in Phase Two. Typically, time is spent on reviewing the strengths of each individual member, what they bring to the team and how their strength is being utilized. Should differences or disagreements exist, the team building experience provides a potentially safer environment in which to practice addressing these disagreements with support.

Often the Team Lead, as the team's authority, is positioned to serve as a model of the use of the Phase Two tools and techniques, with RI consultant's assistance when needed. The end result is not only a healing of whatever tensions may previously have arisen, but also the building of greater trust and respect among the team in being able to handle disagreements in the future, especially with authority. Action plans and steps for improved team functioning result.

PHASE THREE   TEAM BUILDING RETREAT
   Description: Phase Three typically involves
   1. Interviews with key team members to prepare for the retreat.
   2. Two-day team building retreat, working together in developing leadership potential, while focusing on strategic objectives.
   3. Report to summarize the follow-up action steps that relate to leadership development which were generated during the retreat.

PHASE FOUR: COACHING TEAM LEADERSHIP

This last phase, with alterations and customization developed from previous phases, will focus primarily on consulting and coaching with team leads as they continue to apply the materials learned from previous activities and sessions. Attention will be given to addressing team functioning, including how to be more effective with challenging interactions, creating more successful meetings and continuing the improvement of the interpersonal and leadership skills of each team member. Emphasis will be given to enhancing team functioning and improved leadership as well as continuing to develop trust and cooperation.

RI consultants will adjust design to meet the specific needs of participants. Information from pre-session interviews, questionnaires, and information generated throughout the program itself assists RI consultants in developing the most appropriate design for this phase.

The amount of time and attention may vary greatly from one leader to another, depending on the challenges and changes present in that person's division.

PHASE FOUR   COACHING

Description: Phase Two typically involves
1. Individual coaching sessions.
2. Setting and monitoring leadership performance development goals.
3. "Surgical strikes" – guidance in applying techniques and models to the current critical work project challenges.
4. Explore with each VP the possibilities of taking his business unit's team through the Phases One- Four of the leadership development.

FEES & SCHEDULING

FEES

Direct contact hourly consulting	$300/hr.
Indirect support hours	$250/hr.
"2 for 1" hours*	$300/hr.
Daily trainings/teambuilding sessions	$2,500/day
+ reasonable business travel expenses	

*"2 for 1" in which RI decides to involve 2 or more RI consultants in direct contact hours when only 1 may be required in order to provide better service, but RI only charges for one consultant ($300/hr).

SCHEDULING

RI will work with the organization to schedule activities in a way that best fits the schedules of each team.

REFERENCES

For references go to: http://www.resource-i.com/about_reference.html These references have agreed to be available to share their impressions about the value of RI's team building programs in their companies.

FOR MORE INFORMATION

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