An RCI Whitepaper

The Disciplines of Self-Managed Teams

By

Jeffrey and Linda Russell

Russell Consulting, Inc.

Russell
consulting, inc.

Russell *consulting, inc.*

www.RussellConsultingInc.com

E-Mail: RCI@RussellConsultingInc.com

The Disciplines of Self-Managed Teams

By Jeffrey and Linda Russell
Russell Consulting, Inc.
www.RussellConsultingInc.com

Sally is frustrated and has come to you for help. She is the facilitator for one of your company's recently formed self-managed work teams. She reports that nothing seems to be getting done on the team—even though the team has been working hard these past four months. Sally says that lots of time is wasted hashing and rehashing the team's charter with little real team effort to begin tracking or improving its performance. Stating that, in her opinion, the team functions more as a group than a team, Sally says that the group struggles with the boundaries of its authority and with developing methods to manage its performance. She reports that she is also frustrated because she has little help to offer them—she doesn't have answers to their questions.

You've seen this happen before. You know that Sally and the team she is helping have several hurdles to overcome if the team is to become truly self-managing. You know that "fixing" this team requires more than just giving them a pep-talk or clarifying their boundaries. The team needs a thoughtful, integrated effort to gradually master the disciplines of self-management.

Self-management for teams involves a team assuming a set of new roles and responsibilities—roles and responsibilities that have traditionally been the exclusive preserve of managers and supervisors. As a result, when a conventional work group or team moves to become a self-managed work team (SMWT), a whole host of new challenges emerge—along with exciting opportunities.

To successfully survive these challenges and achieve self-management, the traditional team must learn the disciplines of the self-managed team. These disciplines are a set of skills, approaches, insights, and practices that are not typically mastered by more conventional teams. And, since mastery of the disciplines is evolutionary rather than revolutionary, most teams move gradually toward self-management along a continuum from "other-directed" to becoming self-directed.

One of the first disciplines the team must master on this continuum is defining boundaries of responsibility and authority. Much further down the continuum the team eventually works to master one of the later disciplines—that of managing its human resources (e.g., hiring, training, evaluating performance, etc.). In between these two disciplines are a number of other disciplines that must also be mastered if the team is to achieve full self-management. As teams move to master these disciplines, they will very likely experience the frustrations experienced by Sally's team. What can you do to ensure that your group or team survives such frustrations and becomes self-managed? The best place to begin is by simply understanding which SMWT disciplines your team should master first to achieve its own desired level of self-management.

Here are a few of the most important SMWT disciplines. While there are other SMWT disciplines, these may be the most critical to your team's long-term success. Make sure your SMWT "wanna-be's" pursue mastery of these key disciplines to achieve their goal of self-management:

- **Establish & Communicate the Boundaries of Team Authority**: While *all* teams should develop charters that define the boundaries of their work, a SMWT's charter must be more carefully crafted to clearly communicate to its members, to the steering committee, to other teams,

and to the entire organization the specific boundaries of its role and authority. Most SMWTs self-destruct for failing to negotiate a clear and agreed-upon charter up-front—and then failing to routinely revisit this charter to ensure its relevancy.

- **Develop Cross-Functional Skills/Knowledge:** A key factor that sets SMWTs apart from conventional teams is that all members of the team are intimately familiar with all of the tasks done within the team. All members on a SMWT must not only understand the variety of jobs and tasks performed within the team, they must also have the capability to perform each of these jobs/tasks. Training all team members in each other's tasks is an important component of the SMWT skill/practice set.

- **Develop Critical Thinking Skills:** More so than conventional teams, the SMWT must critically evaluate its role in the organization, its charter, its goals, its evolving norms of behavior, its performance, its successes, etc. A critically thinking SMWT doesn't settle for yesterday's success. It is always examining its processes, its environment, its results. The SMWT takes the PDSA cycle seriously, for it knows that its capacity to learn, improve, and excel is only limited by its capacity to critically "study" the path that it has followed and to reflect on that path towards making improvements for the future. The skills of critical thinking (as defined by Stephen Brookfield in his book *Developing Critical Thinkers*, Jossey Bass, 1991) include identifying our mental models or assumptions, challenging the "context" within which the team operates (e.g., organizational structures and worklife), imagining and exploring alternative realities, and becoming "reflectively skeptical." Mastering these critical thinking skills is key to sustaining a SMWT's success.

- **Become Self-Directed Learners:** Traditional work groups and teams often depend upon the learning priorities set by management or the training office. SMWTs must break this dependency and define for themselves what they need to know. This must happen not just to learn what they must to get their job done today, but because the team has to take responsibility for identifying needed skills and knowledges essential for their—and the company's—long-term success. The team assumes full responsibility for exploring what they <u>must</u> know and master next year, and the year after that, and the year after that. The SMWT works <u>with</u> the training office to discover new methods and approaches for learning what the team needs to become self-directed, long-term learners.

- **Manage Team Performance:** Conventional teams may be involved in goal setting and performance evaluation, but management still plays a major role in molding these goals and in evaluating the team's performance. A SMWT assumes <u>full</u> responsibilities for these tasks (within the established boundaries defined in the charter). The SMWT, therefore, must be trained in the skills and knowledge of team performance management. This includes the skills of goal setting, establishing benchmark standards, evaluating performance against standards, developing plans for performance improvement.

- **Manage Human Resources:** In traditional work groups and teams, management usually assumes the primary responsibility for defining needed positions, recruiting the right candidates, establishing criteria for evaluating the candidates, selecting the new worker, and orienting him or her to the job. Further, once the employee is on the job, management then monitors and evaluates the employee's performance and takes corrective action if required to improve performance.

The SMWT, however, assumes full responsibility for managing its human resources. Following guidelines established by the HR department, the SMWT usually performs all of the functions that result in a new hire. It also assumes responsibility for resolving individual performance problems that occur when individual members don't meet team expectations. As a result, team members must learn to master such HR skills as recruiting and selecting new hires, monitoring individual performance, and then taking action to correct performance problems.

While it might be true that SMWTs will approach performance problem solving quite differently than traditional management approaches (e.g., looking for *cause* not blame), the team must be capable of dealing with the team member who fails to work effectively with the team. This may even include the difficult task of disciplining or even terminating a team member. Although managing its human resources may be the hardest skill for the team to master, it is probably the most critical to the team's long-term success.

Before you push your team to master these key disciplines of self-managed teams, it is important to understand that not all teams should pursue all of the characteristics and behaviors of full self-management. Not all teams, for example, will want to assume responsibility for hiring team members or imposing sanctions on team members. Each SMWT—in concert with the needs and culture of the organization—must follow its own path towards self-management. Each SMWT must find its own way to achieve both its and the organization's goals. Failing to master many of these SMWT disciplines, however, will lead the team down the same path of frustration experienced by Sally's team. Attending to the disciplines of self-managed teams is the key to the team's success!

[Note: this RCI White Paper first appeared in **Quality Matters**, the publication of the *Madison Area Quality Improvement Network*.]

Need Help Developing Your Self-Managed Teams?

Russell Consulting, Inc. (RCI) helps organizations who are working to leverage the strengths of their teams toward self-management. Contact us today to learn more about how we can you develop your teams achieve high performance through self-management.

About Jeffrey and Linda Russell

Russell Consulting, Inc. (RCI) provides consulting and training services to organizations in the areas of leadership, strategy, and change. With a special focus on helping companies and their leaders achieve their great performance outcomes, RCI engages its clients in discovering their own path to success — by helping them identify their aspirations and assets and by assisting them in developing strategic and operational plans to achieve their goals.

Co-Directors Linda and Jeff Russell have authored nine books, most recently *Leading Change Training*, *Strategic Planning Training*, *Change Basics*, *Ultimate Performance Management*, *Engage Your Workforce*, *Strategic Planning 101*, and *Fearless Performance Reviews*.

For more information on RCI and its services — and to download or request the current and past issues of its publication *Workplace Enhancement Notes* — visit Russell Consulting, Inc. Online at www.RussellConsultingInc.com or contact us via telephone at 608.274.4482 to explore the ways we can help you achieve your goals.

Jeffrey and Linda Russell
Russell Consulting, Inc.
1134 Winston Drive
Madison, WI 53711-3161
USA
Phone: 608.274.4482
Fax: 608.274.1927
E-Mail: RCI@RussellConsultingInc.com