

CHAPTER 8

DEVELOPING TEAM SKILLS AND ACCOMPLISHING TEAM PROJECTS ONLINE

Deborah C. Hurst & Janice Thomas
Centre for Innovative Management
Athabasca University

Introduction

Traditionally, the primary weakness attributed to distance education at the MBA or professional education level has been in the teaching of team or leadership aspects of the curriculum. Some academics question the suitability of a topic such as team dynamics and communications as a candidate for online learning, believing that this aspect of the curriculum cannot be adequately taught through distance means. Clearly, a lot of what occurs in typical team training programs involves experiential forms of human interaction, conflict resolution, goal setting, and so on. Questions remain regarding the ability to develop “soft” skills online.

In this chapter, we present our experience in teaching and encouraging the exercise of soft team skills in an online environment. Three examples of online team training and team skills practice are illustrated. These case examples exemplify what is possible with respect to developing knowledge of team dynamics and communications, and accomplishing team project work in an online environment. The paper begins with an online application of teaching team concepts at a distance to mid-career professionals. In describing aspects of the team dynamics module, we highlight the unique value and capabilities of an online learning environment.

The second part of the paper elaborates ideas about online learning and working introduced in the first case example through two additional examples. Case 2 examines the operation and characteristics of a highly successful online project team, and Case 3 presents some collected experiences from MBA-level online learning teams. We then synthesize lessons learned from all three cases. We highlight key benefits gained through structured interaction



¹ Dr. Hurst worked with a team invited by the CPLI to develop learning modules for their “millennium project,” a professional learning program. The invitation was based on her research interests and previous experience in the logistics field. The team dynamics and communications module was developed as a two-part learning program, the first part an individual experience of a virtual reality simulation intended to allow the participant to “learn about” concepts in a simulated team, and the second part an online learning environment via the Internet allowing the participant to “learn how to” participate in a online team with other real participants. The real team sessions are facilitated while students work through and apply concepts. This module is facilitated, evaluated, and revised on an ongoing basis by Dr. Hurst. The experiences described here are used with the permission of the Canadian Professional Logistics Institute.

incorporating solid project management and team development practices—specifically, gaining agreement on how members will work together, assign accountability, manage flexibility, monitor progress, and incorporate social interaction. These, we believe, are the key ingredients for successful online teaming in learning (or any other) environments.

Two key ingredients emphasized throughout the discussion of successful online and distance teaming are technology and trust. We make some summary comments on the impact and role of these two concepts, and conclude with some practical recommendations about managing online learning teams.

Ultimately, we are interested in challenging perceived barriers surrounding the ability of online learning to contribute to soft skill and competency development. It is our view that this method of team development is not only effective in developing competency in soft skills and social interaction, but that online learning may in fact be the superior method. We hope that our evidence of what is possible in an online learning environment provides some specific practical guidance on what it takes to accomplish team development and project work online.

Developing Team Skills Online

In this section of the chapter, we describe an example of a leading-edge team development training program delivered online and at a distance. Our purpose in emphasizing this module is to provide concrete evidence of how one institution provides soft skill training online.

The module described herein is part of an overall package owned by the Canadian Professional Logistics Institute (CPLI), created in response to increasing development needs of the emerging professionals within the logistics field.¹ The CPLI decided to combine face-to-face with online learning methods within their program. Modules delivered online include the topics of team dynamics, integrated logistics networks, and logistics process diagnosis. Modules delivered in a face-to-face format include the topics of leading and managing change, supply chain strategies, ethics, and leadership. The CPLI program blends the different learning methods in a unique way to develop soft and hard

practical skills and understanding (with a heavier emphasis on soft skills than is typically provided in this field), as well as tacit insight, competence, trust, and confidence in an online collaborative process for learning and working.

We refer here to the team dynamics and communications module that is delivered online. The module materials are quite like those delivered in a face-to-face context. Learners build on insights and ideas taken from Katzenbach and Smith (1999), among others, to develop key success indicators of teams. However, the online delivery method is very different, in that people connect only through information technology and do not meet face-to-face during the module. They do however, meet face-to-face in other modules, usually after they have completed the team dynamics module. The online learning environment allows users to get beyond the significant challenges of cost, time, and risk imposed by more traditional forms of corporate training and university teaching designed to provide experiential learning to employees or students.

This particular module uses technology in two ways to support learning. The module is six weeks in duration, split into two phases. Phase 1 is made up of a stand-alone CD-based virtual reality simulation that each student completes independently. The second phase involves student interaction that is facilitated technologically, through asynchronous and synchronous tools. A human facilitator also working from a distance guides participant interactions by asking questions and making suggestions throughout the module. We explore the value of both the virtual reality simulation and the online team work that follows in providing “teachable moments” from which learning—both tacit and explicit—is derived.

The Team Dynamics and Communications (TDC) Module—Phase 1

The first part of the TDC module has learners engage in experiential individual learning through a simulation containing scenarios of typical team challenges. The learner is expected to interact with simulated team members (filmed scenarios and pre-recorded graphics) on a time-sensitive, critical mission, to gather

² “Teachable moment” is defined as the precise point at which a learner makes a mistake and wants to correct it, or to learn alternative information with which to interpret questions or responses. It is a brief window where the learner is most receptive to new information that is focused, personalized, and in context. Schank (1997) adds to our understanding of the teachable moment by suggesting that, once a learner makes a mistake, they are emotionally aroused. If the error occurs publicly, the individual will close off, as a result of embarrassment; however, if such failure is private, the learner at that moment is most receptive to new information and learning. The teachable moment often begins with a question and has much to do with an individual’s personal curiosity (see Bennett, 2000).

information, and to experience team and team-relevant issues as they progress through the various scenarios. Overall, the TDC simulation focuses on skills needed for effective team dynamics and “online teaming”: team process discussions, role assignments, leadership, conflict resolution, decision making, and planning for goal success. Many of the scenarios crafted were taken from real experiences that highlighted the most salient issues of team development. Information on how different people store information and label organizational stories was used to construct the decision paths in each scene of the scenarios. Cultural ideas around probable failures and interpretations of these failures were used to inform the scripting. The resulting scenarios were dramatic and interesting, and encouraged participation.

The setting for the virtual reality simulation is a remote area where lightning has started a forest fire and damaged a telecommunications tower. The learner enters the online space and becomes part of an emergency response team that has been given the responsibility of repairing the tower. To ensure some team struggle at this stage of learning, participants are required to deal online with the challenges of travel by canoe, arriving, and completing the mission within a set period of time. If the team functions poorly on the tasks and arrives late, the consequence presented is that telecommunications in the area will go down, and firefighters will not be able to prevent the forest fire from approaching a small nearby town. Every decision that learners make is shown to have immediate consequences within the simulated world, and collectively they convey the risk of failure.

Teachable Moments

Although a learner’s poor decision or mistake may have only caused the team to lose time on the trip, mistakes create important “teachable moments.”² Failure on any task is considered to be an opportunity to learn by determining “what went wrong.” To facilitate learning at these moments, an online coach pops up within the simulated environment to provide just-in-time positive and negative feedback, depending on the learner’s decisions. The learner therefore immediately faces their mistakes, and is able to learn from them in a private and safe environment.

It is Schank's (1997) view that real learning occurs only when people are thrown into scenarios in this way. Participants make decisions, solve problems, make mistakes, and have access to an expert as required to answer questions and to give them advice. Because simulations as such are private, Schank believes that learners may be more willing to risk failure and use that experience for learning. By contrast, failure in organizations is more often negatively perceived, a fact that stifles creativity. In a simulation, people can fail privately with dignity rather than being humiliated when failure occurs in a public way. Failure, like having fun and telling stories, is a powerful way to induce emotion and a powerful learning tool.

Emotions coupled with technology can produce a further positive situation. Computers store learning that has occurred, and can retrieve it if similar patterns are observed later on, thus making learning more specific to individual needs. It is our view that learning facilitated by emotional drive and technological tools is very powerful. Underlying this statement is a key assumption that it is through this unique approach that individuals are provided with an opportunity to learn *to do* something extremely relevant to them (rather than simply learning *about* something), making the knowledge gained through experience both explicit and tacit (Schank, 1997; Stewart, 2001).

Scenarios come to life, and require that learners interact with conceptual information built into the scenarios. Different conceptual aspects of team structure, culture, accountability, and politics are woven into the module design. Information is presented sequentially. Scripts were built in a way similar to a child's multiple path story, where the development of the story depends on choices made. Learning becomes customized, allowing participants to spend greater amounts of time dealing with concepts and skills that are more unfamiliar to or challenging for them. Story-telling is incorporated into the simulated environment as a means of relating content and experiences back to the workplace.

Getting Beyond Technological Apprehension

In an initial evaluation of this product, Hurst and Follows (2003) stated that, as participants enter the module for the first time, some

learners experience technical challenges. The challenges were related not only to computer incompatibility, but also to the degree to which participants were ready to engage in online learning environments. For many, there appeared to be an initial hesitancy and fear associated with learning in a technologically mediated environment. In the evaluation phase, many related their early experiences with the technology to their later impressions of the module. They found the module to be “fun, challenging . . . an overall good learning experience,” but noted that it had been “quite different and a little scary in the beginning.” For some, technical problems persisted.

Interestingly, when probed, individuals remained worried that they would fail in a public way, and as a result become embarrassed, because of their unfamiliarity with the technology. This finding highlights the need to do further work in making participants comfortable with the online environment early in the process. The strength of the apprehension around failure prior to entry into the virtual learning environment was very apparent, and provides clear evidence that Schank’s (1997) claim about a learner’s willingness to take risks and fail privately is of critical importance.

To deal with this learning barrier, further facilitation was introduced before learners used the CD-ROM; the intent was to encourage a greater level of comfort among learners and to minimize any emergent stress. Once the apprehension surrounding technical difficulties was dealt with in this way, the learners’ evaluations of their online learning experience became much more positive. One participant noted that, “I thought that the interactive CD was very well put together and a neat way to learn. I know I now have a better understanding of team building, conflict resolution and the importance of communication.”

Capturing and Building on the Learning

Learners are asked from time to time to make notes of what they are thinking and feeling about their experiences, so that they can use their insights later, in online discussions. Self-evaluation tools concerned with communication preferences, leadership style, and conflict handling are built into the module to give learners an opportunity to focus on specific issues and to develop, and reflect

on, their new skills and competencies. Self-reflective tools are intended to supplement the experience of the simulation through private assessment of personalized feedback. This feedback and record keeping provide learners with input to the second portion of the module, where they engage in a more traditional teamwork simulation with “live” team members, albeit facilitated online and at a distance.

TDC Module—Phase 2

In the second phase of the TDC module, learners enter a synchronous chat environment where weekly synchronous meetings take place. In addition to weekly facilitated meetings, participants are provided with an asynchronous message board for posting documents and questions for review. During the initial chat meeting, smaller teams are formed, and members are encouraged to introduce themselves, discuss their impressions of the CD-ROM experience and their past initial discomfort, and work together to come up with a team name. The new team is then asked to review their experiences of the first phase of the module, and state which aspects they found to be the most important to their learning, and most helpful in forming a new team. Members are encouraged to discuss aspects of team structure, roles, processes, measures of success, accountability, and so on. The new team is also asked to review a chat protocol, provided below, which serves to encourage the participants to discuss conduct expectations and provide additional information based on the team’s needs.

Chat Protocol

- Allow each learner to complete his/her thought before responding—this means do not interrupt or intrude with your thought while another is speaking.
- Be patient; not everyone has advanced keyboard skills.
- Avoid having side conversations; it’s rude not to pay attention.
- Signal when you’ve finished a statement [some use a happy face to signal they have completed their input ☺].

- Signal when you don't understand something; use a question mark to get the facilitator's attention.
- Signal your "reactions" by using an exclamation mark (!) for surprise or a sad face for disagreement ☹ or some combination of symbols.
- Do not shout [CAPITALS MEAN THAT YOU ARE SHOUTING].
- Do not leave your computer during a scheduled session; it is impossible to get your attention if you leave the room.
- Officially sign on and off so that everyone knows when you are present.
- Keep statements brief and to the point; the chat box has a limit of 256 characters per statement; you can keep talking but in spurts.
- Prepare notes and key ideas ahead of time so that you can engage in the discussion without trying to figure out how to word your statements. (CPLI, 2000)

Once ground rules and initial discussions have taken place, the team is assigned the task of creating a reverse logistics plan as a followup to their personal work with the CD-ROM in Phase 1. This task provides continuity as well as additional time for social interaction, allowing participants to get to know one another and become comfortable with the facilitated online chat environment. During this initial stage, it is important for participants to establish and re-establish how their conversations would take place, and who would speak, in what order, to ensure full participation in the experience.

To launch the team task, members are presented with a scenario update, and advised that the fire is almost under control, and that the crew will be finished repairing the tower in approximately six hours. The team task is to work together to create a plan to get team members and the used and remaindered supplies back to the point of origin. They are given three possible options to discuss, as well as many contingencies to consider in coming up with a detailed reverse logistics plan. The facilitator emphasizes the importance of consensus decision making for the task, and reminds team members of lessons learned during the first part of the module.

The facilitator also works to introduce new constraints in an effort to surprise the team, and as a way of introducing potentially

conflicting ideas to get the team working through the developmental phases experientially as well as intellectually. Additional constraints imposed include changes in the mode of transport, environmental conditions, presence of wildlife, handling and disposing of hazardous goods, and other options to challenge the team and bring out different and creative points of view. The goal in this part of the module is to force differences among team members to the surface, with the hope of inciting conflict so that participants have the opportunity to experience and work through new ideas, skills, and competencies in team dynamics and communications.

The second task assigned is the creation of a team charter template, a tool for governing the team's work and social interaction. This is the core activity for the module. With the permission of previous module students, a sample student team charter is attached in Appendix 8A. As this sample team charter shows, the completed document resembles a checklist or template containing a summary of what the team members believe to be the important issues to be addressed in creating and deploying a new team as quickly and effectively as possible. The document contains ideas on how teams should be formed and structured; how their purpose should be defined; how team culture should be developed; and how the team should collaborate, ensure accountability, measure success, and achieve high performance. Learners are instructed first to respond individually to the questions posed, and then to work in their teams to synthesize the information and create one common document. Individuals attend weekly meetings in the chat room to discuss what should and should not be included in the document. The roles of leader, scribe, and timekeeper are rotated among participants, to allow for skill development. By the time learners are given this assignment, they are very comfortable with the online environment and appear to "forget the lack of face-to face cues" (CPLI participant, 2002, personal communication).

Encouraging Explicit and Tacit Learning

In each offering of the module thus far, learners completing the task spent most of their time discussing team structure and process issues. Interestingly, a parallel of explicit and tacit learning occurs; that is, as team members discuss pertinent team-development

issues, participants also appear to experience the same issues. During a more recent offering of the module, a discussion took place around conflict resolution. There was mild disagreement among team members over how conflicts at an impasse should be resolved. While some argued that “trouble makers had the option to leave the team,” others stressed that this was not an appropriate option. Their view was that “consensus must occur.”

The discussion heated and circled for some time, until the similarities between the topic under discussion and the discussion itself were pointed out. This created a powerful learning moment, combining intellectual and experiential elements. Since participants had already discussed effective listening at length, they were able to recognize the value of the discussion, and moved forward with developing a process they could all live with. The learning opportunity or teachable moment was noted as one in which concepts were both discussed and experienced. The template task provided the opportunity for learners to crystallize their learning in the creation of the document itself, take stock of what they have learned individually and collectively, and consider where such learning could be recreated in future teams beyond the module.

Increasing Trust in Technology, the Process, and Each Other

At the end of the module, participants were feeling quite comfortable with the technologically mediated environment, with one another, and with the facilitator. The participant comfort level increased after the first chat meeting experience. One learner noted that, “I initially found it difficult to converse electronically with ten other people, although I see my children doing it all the time. Once I got the hang of it, it became enjoyable.” People commented increasingly on the content of the module as they became more comfortable with the technology, and the use of it became tacit during Phase 2. Team members took control of the work, held additional meetings, assigned tasks to sub-group members, posted longer documents, and so on. Phase 2 activities worked to ground the learner’s new skills and knowledge in additional collaborative experiences. Individuals also had an opportunity to discuss their ideas with others in a facilitated environment.

Participants also suggested improvements; for example, they thought that the short introductions at the beginning of Phase 2 to break the ice should be extended, and should perhaps include personal biographies to allow for further confidence building and comfort with the communications medium and each other in social interaction. However, while many learners thought that the initial introductions were too brief, and that it would be helpful for them to be extended, it is interesting to note that when asked to provide those same introductions at the beginning of each module, they seemed guarded and reluctant to give much in the way of personal information. It was only as team members became comfortable with one another that the personal information and humor appeared.

Learners also provided feedback for how to improve team communications during each session. One idea presented was the development of a speakers' order, so that all team members have a chance to contribute fully to the conversation. When used, this approach appeared to improve the team's performance in discussion, decision making, and collaborating in subsequent tasks, and generally improved the team's interactions with one another.

Team adjournment activities asked learners to comment on what they found to be the most positive characteristics of the team experience and each of their team members. Interestingly, during the first pilot offering of the module, team members decided that they did not want to comment on each individual in the way requested, because they did not want to single out individuals—they were a team. They met offline to discuss this issue, and the team as a unit presented their revised version of the exercise to the facilitator. The facilitator was pleased with how “the team took on the issue and discussed it actively” noting that,

One individual on behalf of the team, suggested that the team wanted to handle the task in a slightly different way and asked first if they could as they had the full agreement of the team. The team came together with a force that night while they displayed excellent consensus decision-making. The activity worked to catalyze the team and pushed them to a higher performance level in terms of their morale and functioning. (CPLI facilitator, 2002, personal communication)

We now take lessons from the online team dynamics and communications module and apply them more broadly to further online teaming experiences. Important aspects of team development experience highlighted include an emphasis on member roles and competencies, such as autonomy, coordination, and collaboration. Here we must note in particular organizational factors, the use of technology, personal management, and interpersonal skills. Organizational factors include networking, knowing the organizational landscape, and maintaining guidelines. The use of technology in online teaming requires knowledge of when to communicate, coordinate, collaborate; of how to communicate effectively; and of communication etiquette. The personal management category includes the ability to prioritize work, set limits, create opportunities for learning and growth, collect and provide feedback, discuss strengths and weaknesses, manage boundaries, and understand cultural perspectives and how these differences can affect perception.

Accomplishing Team Projects Online: Two Further Case Examples

Building from our previous discussion of online team development, we use this section of the chapter to explore and compare the operation of a highly successful online project team and the operation of online learning teams used in an online MBA program.

An *online* team is defined as a group of task-driven individuals who behave as a temporary team, but who may be separated by geographic or temporal space and use network based communication tools to bridge these spaces. By reviewing the experience of these teams, we hope to provide insights into the practices that facilitate collaboration and learning in an online world. Recommendations from these experiences may help others working in the online world or endeavoring to use online learning teams, and so may further develop online team learning programs in a distance education environment.

We explore experience with two different types of online teams: the first is an online research team that conducted a major, practitioner-sponsored research study in three phases over a three-year term; the other is one of the online learning teams used in Athabasca University's MBA program.

Online Research Team—Case 2

The first case study of a real-life online project team provided a way to explore common assumptions and theories. The online team in question participated in a meaningful project under serious resource constraints and within a tight schedule. The project was completed slightly behind schedule and over budget, but to great critical acclaim.

At any one time the project team was composed of between four and eight members. The core team was made up of four members over the course of the first phase. During the second and third phases, only three members participated throughout. All of the core team members were academics and researchers (students). Each team member took the lead on different project tasks; however, one member acted as the formal team lead on contract documents and in the majority of correspondence. The fourth core team member, who joined the team after the project had been initiated and only worked on the first phase of the project, tended to play a lesser role overall. While three of the four core team members actually lived in the same city, the team rarely met in person because of travel and work schedules.

At the end of Phase 1 of the project, the four core team members participated in a series of self- and team-assessments. The instruments used were the Personal Style Inventory (PSI), developed in 1980 by Hogan and Champagne; the Team Effectiveness Profile, developed by Glaser and Glaser (1992); and the Trust Test, developed by Ribble Livove and Russo (1997). The tests were chosen for their simplicity, availability, and potential to provide interesting insights into the operation of the team. They are not represented as the best or most suitable tests. An earlier paper (Delisle, Thomas, Jugdev, & Buckle, 2001) presents the results of the State (behavioral—trust orientation and team process) and Trait (personality) assessments, highlighting the traits and behaviors that contributed to the operation of this creative and successful online project team.

In brief, the team as a whole was relatively balanced, with a slight proclivity towards introverted, sensing, thinking, and judging approaches to the world. All of the members tended to take a judging stance, leading to a potential weakness on the feeling factors. In addition, all four team members had a relatively trusting

orientation in general. Finally, team process assessments provided evidence of a highly effective team, approaching synergistic operation. Further discussion of the impacts of these differences and the usefulness of these tools can be found in Delisle et al. (2001).

The team explicitly recognized its activities as a project and engaged in good project management practices. It did not, however, actively engage with teaming literatures.

MBA Online Learning Teams—Case 3

The MBA learning teams were made up from a student population that had an average age of 40 years, and that typically worked full time in middle management roles in a variety of industries and organizations of many different sizes. The students were randomly placed in learning teams at the beginning of each course. Most courses required that the team complete two or three major group assignments (usually based on a Harvard-Business-School-type case assessment) over the eight-week semester. These cases were done in three stages. Two weeks were spent on preparing and analyzing the case situation and providing recommendations in a report format. Then one week was devoted to critiquing another group's case report, and then responding to the critique of one's own case report. In addition, the students engaged in asynchronous text-based discussion of course materials.

In the first class of the MBA program, students were given an orientation to the online technology and to appropriate ways of working in the online environment, and a quick introduction to “best practices” in team development. Typically they were assigned to learning groups with others they had never met before. As the program progressed, there were increasing chances that the teams could include a few members who had worked together before. This situation was a relatively accurate simulation of the work environment individuals faced in modern organizations. More often than not, a team must rapidly come together with individuals who may or may not know one another, and must quickly begin to perform assigned tasks.

Unlike the research team, the students were encouraged to review and adopt good teaming practices early in each and every course. As was the case in the TDC module discussed earlier, online

learning groups were assigned at the outset, and were given the task of developing an operating team charter intended to shape the way they would work together. However, this activity was not graded, and was done with varying degrees of competence and intensity by each learning team.

Another key difference from the research team is in the formal application of project management practices to the operations of each learning team. The research team consistently viewed their work as project work; the duration of memberships might vary, but the team was working toward a common completion goal. On the other hand, the MBA teams tended to view their work as process work toward an individual end result (an MBA), rather than work on a specific project. This attitude may be a result of a combination of lack of exposure to project management principles and the nature of the learning environment.

The different contexts experienced by a team working on an assigned project for the sake of the project and a team of students working on a project for grades are quite different. However, in each case, we have noticed important knowledge being transferred through explicit and tacit learning while the team members worked towards their goals. Several practices seemed to facilitate these learning processes. We turn now to a discussion of the practices that we believe support both learning and teaming in an online environment.

Key Practices in Successful Online Teaming

Looking across the two different cases of team experiences and drawing from our earlier discussions on teachable moments and tacit and explicit learning, we saw emerging a number of key attributes associated with the successful use of online teams. It is our view that these key practices include agreement on how teams will work together, assignment of accountability, monitoring of progress, and incorporation of social interaction. We discuss each of these practices with examples from the three cases presented above.

Agreement on How Teams Will Work Together

In the case of the highly successful online research team, there was very little initial discussion of how the team would work together. The three initiating team members were driven overachievers who were highly motivated by the task. All were known to each other. Two had worked on a small project together earlier, and so had already established a certain amount of trust and goodwill. This relationship and common understanding of the importance of meeting goals played a significant part in helping them to form and start working quickly. These team members understood the need to define deadlines and to complete deliverables on time. The common focus on agreed-upon goals and timelines enabled the team members to monitor their own personal goals to ensure alignment with the overall project goals.

The project began with almost impossible deadlines from the beginning. Whereas this reality could be a recipe for failure on any team, in this case, the common threat allowed the team to come together quickly, and was the catalyst for many spin-off projects. As the project careened towards its first “drop dead deadline” about two weeks after the project started, tempers frayed and workloads were heavy. Once the first deadline was met, there was a one-month period in which the team waited to see if the proposal would be accepted. During this time, the group sent numerous e-mails sharing their situations and discussing their goals, objectives, and personal commitments for the period ahead.

By the time the proposal was accepted, the team had a much clearer idea of each member’s individual commitments, and about how difficult it would be to get this project successfully completed. One team member was working 80 hours a week on a high-pressure professional job. Another had a two-month-old baby, two other children, a full time job, and a thesis to finish, in addition to this project. The third was half way through a Ph.D. project and had a faltering marriage. They discussed how they would meet the upcoming deadlines, and who would take the lead on which tasks. Sharing issues, life experiences, and challenges allowed the team to feel a greater sense of cohesion and cooperation, and ultimately to jump in and help each other out when necessary.

Slowly, and in an emerging rather than conscious fashion, an agreement on how the team would work solidified. It was never

written down or formally agreed upon, but it seemed to involve the principles noted below.

1. The deadlines must be met. This project was important to all.
2. Whoever was best able to lead on a particular task would do so.
3. Each member would contribute 150% to this project, and endeavor not to let the other team members down.
4. Team members would raise a flag (let others know about tasks not likely to get done on time).
5. Team members would pitch in to complete work as needed.

It seemed clear that this team would never have been able to make the progress they did if they had not had this one-month breathing space to work out how they would work together. They learned these lessons experientially, by being thrown into the process, and the result was fortunately positive. If this team had clearly applied team-building approaches to their own work prior to commencement, rather than after the first deadline, they may have been able to tackle this task explicitly and incorporate some “best practices” earlier, and avoided some angst later on. Whatever the case, what is highlighted here is once again the unique marriage of explicit and tacit learning about team process. The team learned the importance of dealing with social interaction issues and ground rules for working together as they stormed through their first real process issues, realizing the teachable moment.

Experience with MBA project teams suggests, however, that explicit teaming might not have helped. Students in every offering of the project management course are encouraged to develop a formal team charter before starting to work on the learning exercise. Some individuals and some teams do take this task seriously, and tease out the details of how they will work together before beginning work, but most do not appear to think this task important until after problems begin. The tight timelines and task-driven individuals push the teams into action, much as in the case of the research team introduced above. When conflicts begin to brew or issues around collaboration become important, charters are worked out on the fly, during the course of the first team assignment. Some teams must call a halt and revisit this exercise before they can make any progress on the projects; others fail

completely on the first task before they recognize the need for and value of this process element.

The importance of this part of team process appears to be learned explicitly, but as highlighted by the case examples, does not become “real” until conflicts occur within the process and the team acquires knowledge experientially. It seems that once the importance of the charter becomes clear and the gap between theory and practice obvious, the teachable moment can occur. In some teams, this moment may be lost; however, it appears that in the experience of each online team, it was not. Within the learning module, the facilitator was able to use the moment to pull out or convey some important information. Within both actual teams, the team members were able to go back to information provided, recognize the source of difficulty, and move on to develop a charter.

In our view, it is what occurs in the gap between failure and the recognized need for additional information or work in order to deal with the failure that builds capability. This is where we believe online development products are most powerful. However, what is also clear about this gap experience is that trust in technology, trust in process, and trust between individuals are critical factors.

Team charters and chat protocols are some of the tangible tools that force teams to explore these issues in advance. Incorporating these products into any online teaming experience is likely to improve the ability of the team members to work together.

Assignment of Accountability and Building in Flexibility

A definition of roles and responsibilities is often identified as a fundamental part of high performing teams. In traditional team literature, the need for clearly defined roles is fairly well recognized. It is believed that it is absolutely essential that everyone clearly know who is doing what—particularly in online teams where you may not be able to observe what others are working on. At the same time, online teams require a certain amount of flexibility to get the most out of their members. If one member of a online team has a time differential that is advantageous, it only makes sense for that person to take responsibility for certain tasks, even though someone else may be accountable for them.

Sometimes, given the asynchronous nature of much online teaming, this necessity can cause problems.

Lipnack and Stamps (1997) suggested that in online teams, team roles defy definition, because online teams focus on achieving tasks in a fluid and flexible manner. It is also recognized that shifts in leadership can drive changes in team members' roles. In online teams, leadership moves from one group member to another, from one geographic or temporal site to another, or both (Miller, Pons, & Naude, 1996). In many cases, more than one team member possesses information vital to the team's functioning and well being, and as a result will accept leadership status assigned by the team. Team members are often willing to step into and out of the leadership role without fear of stepping on one another's toes. Although there remain paradoxes in terms of power sharing and role shifting, Gristock (1997) and Palmer and Johnson (1996) point out that online teams can experience simultaneous benefits of vertical and lateral communication without reorganizing physically.

Clearly, roles and leadership are not as clearly defined in the online environment as in the "real" world. The literature suggests that the need for boundary spanning and communication may intensify as roles and objectives become more ambiguous (Eccles & Crane, 1987; Weick, 1982). Furthermore, the amount of border spanning may vary over time, influencing communication patterns and the ability to shift roles easily (Burt, 1993; Weick, 1982; White et al., 1976). This ambiguity can be quite uncomfortable for those used to working within traditional, rules-based organizations. Research suggests that teams that have met or have first established face-to-face relationships appear to form bonds more easily and to be more comfortable shifting roles (Walther, 1996). This finding suggests the need for some form of kick-off for each online team—face-to-face may be superior, but voice and online also work, as evidenced by the research team and the online learning teams.

Sometimes the trick is simply to assign an initial responsibility, and then trade it off as necessary. This was certainly the case in the online research team. Tasks were initially accepted or assigned to an individual based on availability or inclination. If there was some reason that deadlines could not be met, the tasks were shared out again. Careful records were always kept on who was doing what,

and when. This kind of tracking allowed for the development of more ambiguous roles among members and for the sharing of responsibility, while maintaining accountability for deliverables.

In the MBA teams, we see good use of role assignment in the beginning of most courses. Every one signs up for a particular task. Where it sometimes falls down is when an individual is assigned a task for which they are not suited, or when circumstances make it difficult for that individual to fulfill the assigned role. Many people do not adapt well to the fluid nature of work that is characteristic of asynchronous online teams. Because we are not necessarily doing work at the same time of the same day, it is important that people volunteer when they see that someone needs help, and that they speak up when they are in that position. For people used to doing their own jobs and letting someone else worry about the big picture, this can be a difficult skill to master.

Teams that quickly come together and share details of their personal schedules, why they are only available at certain times, and when they may not be available, tend to work better. In the online research team, one member could only work on the project before 8:30 am or between 7 pm and about 9 pm, because of work commitments. Another tended to be a night owl, getting productive between 10 and 4. The third and fourth members tended to have more flexible daytime schedules. Thus, if one member could only work until 8:30 and couldn't finish the task, it only made sense for someone with time during the day to take the next cut at it, then the first could look at it again after dinner, and the next after 10 pm.

The balance between accountability and flexibility introduces an ambiguity into the working relationship that many find difficult to deal with. Can I count on you or not? Do I need to monitor you or not? If I don't, how do I know when to help out? To make the process work, individuals must engage in self-monitoring, team process monitoring, and proactive commitment to the work of learning. Individuals whose sole goal is completion of the course or project task are the least likely to be able to engage in this type of behavior, and the most likely to exhibit free rider tendencies. It is the commitment to the project, or the learning, or the individuals that fosters a team member's ability to deal with the ambiguity of shifting roles and responsibilities. Without this commitment, and trust, the team will not be able to balance accountability with flexibility to get to synergy.

Monitoring Progress

The research team used minutes, e-mail and conference calls, and deadlines to monitor task progress. Weekly conference calls were boisterous, friendly events that each member looked forward to. While this team rarely met face-to-face to hold each another accountable for the many decisions, promises, and activities each member took on, each individual's personal urgency and commitment to come through on the commitments they made, and to "cross another item off" their weekly list of deliverables, kept the team moving forward. When commitments could not be met, team members openly admitted the reason behind their lateness, and took steps to complete the task or accepted another's help to do so.

In the weekly conference calls, the team met for one hour once a week. The first five minutes of any conference call were devoted to catching up on "social history." Roughly 45 minutes were reserved for detailed discussion of upcoming deliverables and the status on outstanding tasks. Team members took turns chairing these meetings. The last 10 minutes of each meeting were used to report on important external commitments of the team members (thesis progress, work promotions, baby's first steps, etc.) and their personal stress levels.

The conference calls tended to be exuberant, extroverted activities. The high introversion score seemed to be a puzzle to the team members. While they all knew themselves to be quite introverted, they marvelled at the extroverted nature of their interactions both in e-mail and in conversation. One member stated, "although we have three introverts, you'd never know it from our interactions. Feeling comfortable, trusting and sharing with each other brings out the E in us" (Delisle et al., 2001). The conference calls allowed the team to stay on top of three critical elements of progress—social activities, project activities, and external activities—each of which added an important component to the interaction. Shared goals and open communication around objectives and limitations, combined with trust in future reciprocity for current efforts, made the team trust level expand.

In addition, the project team submitted monthly status reports on project activity and accomplishments to the funding sponsor. This formal requirement forced the research team to take stock on a regular basis of accomplishments and outstanding tasks. The

“taking stock” activities encouraged accountability and the meeting of deadlines. It also provided a formal arena for tackling outstanding issues and raising concerns to be dealt with by all major stakeholders in the project.

The MBA teams worked on much shorter timelines, measured in weeks versus years. Their use of status reporting seemed to be much lower. Some teams did status checks during the course of the project, but most tended to set a plan and then try to work to it. As in any project, this is where many of the problems come in, as the team fails to manage the ambiguous and changing nature of the work environment.

In the Team Development Module, the regularly scheduled weekly “chats” served a similar structuring function as the monthly status reports and weekly conference calls used by the research team. The requirement to engage at one time with all members of the team, and to be ready to make good use of this time served as to facilitate some regular progress monitoring and progress checking.

Competing demands, and disparities in team member commitment and what each member desired as a team outcome (“pass” vs. “A”), combined and trapped many of the learning teams. However, competing demands are no different in the working world. The resolution as always rested with open communication of goals and expectations, and then with working around each individual’s peculiar demands and interests. Status reporting and regular discussions of process and feedback appeared to be catalysts for this type of sharing, and for getting the important issues addressed on a timely basis.

Incorporation of Social Interaction

In general, the social interaction on the research team occurred sometimes by e-mail, sometimes in person, and most times by conference calls. They tended to be boisterous times, filled with laughter that all members appeared to highly value. Conference calls often acted as a welcome counterbalance to the pressure on the group to meet stakeholder expectations, deliver results on time and

on budget, and work through the many obstacles that emerged. It created a supportive camaraderie that also helped members manage their own substantial professional workloads above and beyond the online project activities (Delisle et al., 2001).

Hartman (2000) suggested that “fun” on projects is a substantial motivator, and contributes to a culture where work is accomplished without the same level of burnout as in other environments. In general, there were three things that the research team did explicitly to ensure that the project was “fun” for all involved.

1. Celebrate success: The beginning of each conference call always included kudos to anyone having completed a task or reaching some other milestone. E-cards were used judiciously to celebrate any success or other event. Each status report always started with accomplishments for the period even when the more critical part was the concerns or issues that needed to be addressed.
2. Plan for interaction: Some of the project's limited funds were set aside to support celebratory dinners or events when all the parties could be found in the same locale. One research conference a year was funded for the entire team to meet face to face. This “face time” provided a lot of lingering benefits in keeping the team motivated and onside for the more “tedious grind” parts of the work.
3. Communicate about other than project activities: The research team regularly made an effort to catch up on “social” aspects of the various team members' lives. Knowing how the rest of the individual's life was going provided good insight into what you could be expected to do on the project tasks, and where others might be able to help out. It also allowed trust to grow on a number of levels. It is one thing to trust someone's competence; it is quite another to care about that individual and to trust that they will care about you.

Admittedly, the second of the above goals is difficult to accomplish, or to imagine as developing in an online learning environment. However, it is surprising how innovative students can be when given the opportunity. Since its inception, the Athabasca University MBA program has provided a non-graded workspace for students to use as they wish. It is thought of as akin to the

online water cooler or coffee house. It provides MBA students with room to get to know each other away from the pressure cooker of the team project workspace. Although the space is used to varying degrees, it works most effectively as a way of enhancing the learning environment. One student has very successfully run “Joe’s” bar in the roundtable workspace of every course, much to the delight of his fellow students and of academics. Sharing jokes, humor, frustration, births, deaths, and other life occurrences in these informal settings truly allows the students to get to know each other in ways that they would normally do over a cup of coffee or mug of beer outside of class time.

A variation of this phenomenon also began to occur in each offering of the team development module. Participants appear to regret the completion of the module, insofar as it means losing access to the rich social interaction they experienced with their new team. We found that adjournment ceremonies and behaviors online and in the synchronous and asynchronous environments were quite similar to those experienced in the adjournment phase of a face-to-face team. MBA students often exhibit withdrawal at the end of the program in a similar fashion. The research team experienced similar “mourning” at the end of the project, as the unique circumstances of the project drove a fiercely supportive and productive working relationship that has been difficult to replicate after completion.

Furthermore, research on the effectiveness or contribution of these technologically enhanced “social” realms to the learning activity is needed. It would be interesting to see if the number of entries in the various learning programs and actual teams correlate with grades, or entries in the course work or case work, or student satisfaction, or other measures defined as team success.

Cross-cutting Themes

Across all the online team experiences highlighted in this chapter, we note three important cross-cutting themes with respect to using teams and teaching about teams in an online context. The first theme deals with the use of technology in enabling online teaming. The second has to do with the impression that trust in the technology, the process, and the people is a prerequisite to both the

learning and the functioning of the teams. Finally, developing a supportive culture through instilling beliefs, values, and processes that facilitate open communication, support, and trust is important in realizing learning and teaming in this environment. Each of these themes is briefly explored in closing.

Technology as Enabler

Technology plays two important roles in the online learning or teaming experience.

1. Apprehension and preconceived notions about technology-mediated discussion caused problems in getting teams started, as evidenced in the team module and reaffirmed in every run of the MBA courses.
2. Technology failure in online teams could be
 - a. a convenient excuse: “I didn’t get that note”; “I couldn’t participate in the teamwork because my computer hard drive crashed.”
 - b. a significant frustration. In an eight-week course, having your hard drive go can take you down for a significant portion of the course, and make it very difficult to carry your end of the team commitment.

The Role of Trust

With respect to trust, there is one further distinction that we would like to raise between online and traditional teams. This distinction lies in the nature of the situational awareness. It has been suggested that online teams function on an intentional awareness, because only specific characteristics of suitable resources or providers may be known (Chen, 1997). Situational awareness for online teams is contrasted to the extensional awareness more likely in face-to-face teams, where the specific resources or providers are known. This different kind of awareness of the resources plays a big role in how the team becomes an entity, as well as in how it will weave together its skills sets, and in the process build trust.

It is our view that the level of trust among participants (perhaps from having members who had worked on other teams together, or

from a shared level of trust in the experience through the culture of the program, or as a result of trust in the coach) determines how well people work together and how seriously the charter is taken. It is clear to the team members of the online research team that they would have been hard pressed to continue working together if they did not have a strong desire to do so, and trust in the other team member's abilities. Thus trust in competence, contract, commitment (Reina & Reina, 1999), and character (Marshall, 2000) all play a significant role in the initial stages of online team development.

Weick (1996) suggests that people organize cooperatively on teams in order to learn and complete their work. There is a continuous mix of agency and communion that creates a shared reciprocity between individuals and that benefits both learning and team function. However, as highlighted in this chapter, trust is required for meaningful cooperation, and is often missing in the early stages of relationship building.

The development of trust in online teams is not nor can it be a quick and easy task. There is a need to look behind apprehension and fear to listen to and capture an individual's heart before trust can follow. There is an interesting paradox when considering trust. On the one hand, we see that a team must be productive quickly, and that individuals need to trust and to be trusted within the team. But on the other hand, few people on teams or in any relationship will trust immediately. Team members thrown together will more likely distrust the motives of others at the outset. This human truth has implications for development, early sharing of personal information, and hence, charter development, as found in our three cases. The cases also highlight the distance people will go when they do trust, and how reluctant they are to let go of team members once a trusting relationship is in place. Social interaction and trust therefore are key in any team and learning process. Once team members trust, they are more likely to make their tacit knowledge explicit, transform explicit knowledge into tacit knowledge, and in the process, enlarge overall understanding.

We obviously need to know more about how to discern trust levels early, and about what we can do to build them rapidly. Examples of factors that heavily weight our decisions to trust other people include the degree of leeway or freedom to act without controls in place, the level of benevolence, the evidence of

openness, and the degree of risk taking. When a high level of trust exists, fewer rules or controls appear necessary. Obviously, trust is a tricky concept and a necessary consideration in online teaming. If we can invoke a culture and process that encourages rapid development of such assessments, we should be able to encourage rapid trust building which can only facilitate our learning and teaming processes.

The Importance of Learning and Teaming Culture

Another point highlighted by our discussion of trust, trust building, and implications for team performance is how we might create or transform a culture to allow meaningful, trusting relationships to develop. Marshall (2000, p. 66) states that

to create a truly customer-driven, team-based, and trust-centered organization . . . would require a fundamental change in the organization system . . . new technologies would not fix it . . . training programs [alone] could not make it happen . . . restructuring into teams by itself would not meet the need.

Instead, transforming a business requires that we transform the way work is accomplished and the culture within which it occurs. A new approach would be relationship based, and would support an agreement or covenant between management and others, spelling out understandings of trade-offs between risk, skill, labor, and rewards, and delineating the way people will treat each other. The covenant would frame character, quality, and integrity in the work relationship, and would reflect underlying beliefs about human nature, drivers of the business, and how management and other actors in the workplace will change.

Project management practices may provide tools for developing a culture of trust, accountability, and transparency conducive to rapid trust development. The importance of establishing a team charter early on to focus the team is only one example of the importance of engineering the culture of teams. The establishment of the team charter and acknowledgement of culture was shown to be important in our three cases, as in each case, team members ignored this fact until faced with situations of conflict.

Conclusion

This chapter sheds light on some of the controversies associated with teaching teaming and using online teaming in distance education programs by providing some insights into the operations of a team-building distance simulation, a successful online project team, and the use of teams in a distance-based MBA program. Our experience in these and other online team teaching and working situations convince us that these skills are teachable and transferable in an online world.

In multiple runs of the team-learning module, we have found the virtual reality simulation to be a very effective way to introduce the concepts of teamwork. Followed up with teamwork in an online facilitated setting, it appears to be developing understanding and soft skills in this new online environment.

Over the nearly ten-year history of the distance MBA programs at Athabasca University, and particularly within the project management course, we have witnessed similar results. Our students develop not only an explicit understanding of online team dynamics, but also tacit skills in making it happen. One of the primary skills developed in traditional MBA programs is networking and oral presentation of information. In our program, we work on these skills too, but the main skills our students develop as a result of the program are the ability to share information, insights, and criticism over the Web, and to build and work very effectively on online teams.

The biggest problem in any team undertaking is the assumption that you can put people together to work on a task, and they will automatically become a team and know how to work together. This assumption is equally false in both the face-to-face and the online team contexts. In the online world, it may be even easier to ignore the human process side of team work in the absence of physical clues revealing the psychic health (or lack of) of the team. The trick is to put the effort into the process side of teaming and teaching, even when it is less visible than in the face-to-face environment. We reiterate, however, that it can and must be done.

Project team learning in an online world has become a fact of life at work and in our education settings. The experience from the three cases presented provides some suggestions for how to approach this activity in a learning or work setting.

Recommendations

Effective teamwork requires continual monitoring and assessment. Effective teaching does the same. The recommendations given below may facilitate online teaming and learning endeavors.

- Work hard in the beginning to develop a trusting environment. Without it nothing will work. Trust builds as relationships build in online teaming, and therefore must be present in online team development.
- Expect shifting of roles and leadership. Sometimes the teacher will be the taught and the leader must learn to follow.
- Employ as many forms of interaction as possible in the initial phases of the collaboration. If possible, face-to-face is probably the ideal way to kick off. However, most of us do not have this luxury, and there is growing evidence about and experience with online kick-offs, such as the learning module discussed above.
- Open communication is critical to any team endeavor. Determining how to encourage it in your particular online world is your most critical task.
- Employ good project management practices. Agree how you will work together. Plan the work. Assign responsibility. Monitor progress. Celebrate success.

References

- Aranda, E. K., Aranda, L., & Conlon, K. (1998). *Teams: Structure, process, culture and politics*. Upper Saddle River, NJ: Prentice Hall.
- Bennett, C. (2000, Winter). Capturing the teachable moment: In-house staff development. *Oregon Library Association Quarterly*, 5(4). Retrieved October 18, 2003, from <http://www.olaweb.org/quarterly/quar5-4/bennett.shtml>
- Burt, R. (Ed.). (1993). *The social structure of competition in networks and organizations*. Boston, MA: Harvard Business School Press.

- Canadian Professional Logistics Institute (2000). *Team dynamics and communications module*. Toronto, ON: Author.
- Chen, L. L.-J. (1997). *Modeling the Internet as cyberorganism: A living systems framework and investigative methodologies for online cooperative interaction*. Unpublished doctoral dissertation. University of Calgary.
- Delisle, C., Thomas, J., Jugdev, K., & Buckle, P. (2001, November). Virtual project teaming to bridge the distance: A case study. Paper presented at the 32nd annual Project Management Institute Seminars & Symposium, Nashville, Tennessee.
- Eccles, R. G., & Crane, D. B. (1987). Managing through networks in investment banking. *California Management Review* 30(1), 176-195.
- Glaser, R., & Glaser, C. (1992). *Team effectiveness profile*. King of Prussia, PA: Organizational Design and Development, Inc.
- Gristock, J. (1997). Communications and organizational virtuality. *E-Jov. The Electronic Journal of Organization Virtualness*, 2(2), 9-14.
- Hartman, F. (2000). *Don't park your brain outside*. Philadelphia: PMI Publications.
- Hogan, C., & Champagne, D. (1980). *Personal style inventory: PSI instrument*. King of Prussia, PA: Organizational Design and Development, Inc.
- Hurst, D., & Follows, S. (2003). Virtual team development: building intellectual capital and cultural value change. In M. Beyerlein (Ed.), *The collaborative work systems fieldbook*. (pp. 543-560). Denton, TX: University of North Texas.
- Katzenbach, J. R., & Smith, D. K. (1999). *The wisdom of teams: Creating the high-performance organization*. New York: Harper Collins.
- Lipnack, J., & Stamps, J. (1997). *Virtual teams: Reaching across space, time, and organizations with technology* (2nd ed.). New York: Wiley.
- Marshall, E. M. (2000). *Building trust at the speed of change: The power of the relationship-based corporation*. New York: American Management Association.
- Miller, P., Pons, J. M., & Naude, P. (1996, June 14). Global teams. *Financial Times*, 12

- Palmer, J. W., & Johnston, J. S. (1996, December). Business-to-business connectivity on the Internet: EDI, intermediaries, and interorganizational dimensions. In A. Rainer, B. F. Schmid, D. Selz, & S. Zbornik. *EM—Interorganizational Systems. EM—Electronic Markets*, 6(2). Retrieved December 22, 2003, from http://www.informationobjects.ch:8080/NetAcademy/naservice/publications.nsf/all_pk/74
- Ribble Libove, L., & Russo, E. M. (1997). *Trust—the ultimate test*. King of Prussia, PA: Organizational Design and Development, Inc.
- Reina D. S., & Reina, M. L. (1999). *Trust and betrayal in the workplace: Building effective relationships in your organization*. San Francisco: Berrett-Koehler.
- Schank, R. (1997). *Online learning: A revolutionary approach to building a highly skilled workforce*. New York: McGraw-Hill.
- Stewart, A. (2001). *The wealth of knowledge: Intellectual capital and the twenty-first century organization*. New York: Currency.
- Walther, B. J. (1996). Computer-mediated communication: Impersonal, interpersonal and hyperpersonal interaction. *Communication Research*, 23(1), 3-43.
- Weick, K. E. (1982). Management of organizational change among loosely coupled elements. In P. S. Goodman (Ed.), *Change in organizations: New perspectives on theory, research and practice* (pp. 375-408). San Francisco: Jossey-Bass.
- Weick, K. (1996). Enactment and the boundaryless career: Organizing as we work. In M. B. Arthur & D. M. Rousseau (Eds.), *The boundaryless career: A new employment principle for a new organizational era* (pp. 40-57). New York: Oxford University Press.
- White, H. C., Boorman, S. A., & Breiger, R. L. (1976). Social structure from multiple networks I—block models of roles and positions. *American Journal of Sociology*, 81(4), 730-780.

Appendix 8A: Example of CPLI Student Team Charter

*Model adapted from
Aranda, E. K., Aranda, L. & Conlon, K. (1998) and
Katzenbach, J. R., & Smith, D. K. (1999)*

TEAM CHARTER

Team Dynamics & Communication
Canadian Professional Logistics Institute Module
October 2003

Structure

Membership

- For the purpose of voting the team membership should consist of an odd number of members (suggest 5 or 7 members).
- Members should be chosen from the various key departments within the company (Upper Management, Logistics, Finance, Information Technology, Engineering, Research and Development, Sales and Marketing, etc.).
- Members should have unique roles on the team to avoid duplication of effort and responsibility.

Skill Mix

- Members should represent experts in their field from the various key departments within the company (Upper Management, Logistics, Finance, Information Technology, Engineering, Research and Development, Sales and Marketing, etc.).
- Members should have the skills, experience, and authority to make necessary decisions, supply answers and provide direction in time of crisis.
- All team members should have excellent leadership, communication, and listening skills.

- Outside skilled support people and/or agencies should be added and included as needed during the crisis/disaster. Examples of support people and agencies are Fire Department, Forestry Department, Medical Agencies, Police, Military, Environmental Agencies, others as required.

Purpose

- Provide emergency services in the event of all natural disasters.
- Function analytically and provide alternative options for all emergencies.
- Provide support to those on the front line, execute thoroughly, safely, and quickly.

Assumptions

- Do not assume roles of responsibility. Define a roadmap of the team's objectives and goals and each team member's role/responsibility.
- Clearly set guidelines on how we will conduct and display our disagreements and that no decision is made unless the team agrees (consensus of course).
- Clarify assumptions about teamwork—how they might interfere and why it is important to clarify in a team's structure. I.e. Dept. "X" contact Police, Fire, and Ambulance. Dept. "Y" contacts . . . Dept. "W" coordinates . . .
- Recognize people will panic and thinking irrationally. Have panic plan in place for various disasters.
- Assume the worst scenario and develop an action plan for the most obvious change. I.e. Weather conditions.

Key Success Measures

- Take the necessary time to respond to tasks. Do not rush a decision.
- Take measures to avoid a disaster.
- Establish a reaction time based on nature of disaster.
- Ensure teams know what, when, who, where and why in a disaster. They know their place.

- Ensure all teams prioritize their time and are available to react to a disaster.
- Regular progress assessments should be maintained by the lead for that disaster.
- A follow-up meeting or meetings will be established by the lead for that disaster as required.
- During disaster situation try to avoid causing any disruption to day-to-day operations as much as possible. Avoidance of down time.
- There should always be a focus on avoiding any unnecessary risk of injury or casualties.
- A situational report and structure shall be established by the lead for that disaster.
- A measurable reaction time to a disaster should be established.
- A monthly report will include test scenarios by activity and specific disaster.
- A monthly communication shall be distributed to each team for up to date information and events.
- Ultimately no casualties.
- KPI's (Key Performance Indicators)
 - Reaction time
 - Teams in place
 - Available for action
 - No down time

R & D Process

- Emergency Response Training for all areas to better understand the nature of each disaster and action steps.
- Team leads will be established according to the nature of the disaster.
- A measurable response time to each disaster shall be established.
- A disaster may require the use of more than one leader depending on the nature of the disaster.

- A defined set of responsibilities and hand off procedures shall be established according to the disaster.
- Define the gaps within team members and arrange for appropriate training.
- Visit and revisit purpose as team runs into challenges.

Leadership

- Team leads will be established according to the nature of the disaster.
- A disaster may require the use of more than one leader depending on the nature of the disaster.
- A defined set of responsibilities and hand off procedures shall be established according to the disaster for each leader.
- Across function/department, interaction and collaborative work ethic shall be established.
- A leader shall establish a follow-up meeting or meetings for the specific disaster as required.
- A leader shall empower members of his team or other teams in an effort to resolve a disaster.
- Monthly meetings shall be held with leaders in each department.
- Establish skills and abilities of each team member and identify the gaps. I.e.:
 - stress levels
 - collaboration skills
 - problem solving skills
 - decision-making skills
 - communication effectiveness
- Maximize on individual expertise.
- Empower and encourage team member to take leadership roles, particularly if their styles of communication are different.
- Rotating leadership roles according to the demands of the situation can help spread the load and enhance innovation.

Process

Ground Rule & Actions

- Turn off all cell phones prior to start of meeting.
- Respect the other members of the meeting, do not interrupt, & listen to what they have to say.
- Participate in the discussion.
- Have an agenda & be prepared to deal with topics.
- Have predetermined roles for members, (i.e. Chair, Minutes, etc.).
- Before meeting is over, take 10-15 mins. to review session so that all know what is expected.
- No one person has blame for failure & no one person has praise for completion. One for all, & all for one.
- When good & productive ideas are offered, mold & praise the person so that you build favorable responses in the future.
- During meetings, a section, or block of time needs to be set aside for round table discussions, each member have the opportunity to say or not to say anything.
- Regular training/re-training for all members of the team. Set an amount of time between evaluations and all members need to stick and abide by the timeline.
- Have “Night’s off” outings. The team goes out for dinner/drinks to build trust & faith in one another.
- If a certain member’s ideas are implemented, recognize that (i.e. Publications, Report, etc.).
- Regular reviews by co-members:
 - Learn from mistakes
 - Learn to take criticism
 - Builds trust
- Start meetings off with 5 mins of new idea session after minutes from last meeting are read.

- The roles of the team will have to be determined by members' strengths and weaknesses.
- The Chair & Minute taker should remain the same but an incident leader should be identified and it needs to be based on their strengths for the issue (i.e. Fire Marshal for a fire, etc.).
- Set-up times frames for meetings and training.
- Set-up what type of meetings need to happen, face to face or conference calls, weekend retreats?
- Set-up time frame and outline of meetings.

Managing Meetings Effectively

- Before meetings, an agenda is sent out to the members for review.
- Come prepared & ready to discuss the topics.
- 1st 5-10 mins should be a review of the previous meeting's minutes and then another 5-10 mins should be a round table of "New Ideas," opportunity for everyone to bring new ideas forward for the group to evaluate.
- Egos will be left at the front door before you walk into the meeting.
- Listen and respect one another.
- Do not interrupt other members when he/she is talking.
- Ideas are all thrown out onto the table and group evaluates all ideas, prioritize them if necessary, and discuss pros/cons. This is done through discussions by all to build consensus and if that cannot be completed a vote will be in order with majority ruling.
- Meetings must be kept to the order and period set out in the ground rules.

Understanding Skills and Needs [personal and group]

Constructive feedback

- Team members must have an open mind and be open to other's opinions and be open to changing their mind.
- Acknowledge need for feedback.

- Contract for the feedback.
- Know when to give feedback.
- Understand the context.
- Focus on the needs of the receiver.
- Must always show respect.
- Thinking must be proactive.
- Good listening skills are critical.
- Always be looking for opportunities for improvement.
- No laughing at others when they are speaking.
- Create a supportive environment.
- Remember the goal is important when giving feedback.
- The end state is what matters, not individualism.
- Restrict feedback to things known for certain and things that can be changed.

When providing feedback to other team members, the Constructive feedback model is to be applied.

- Ask for permission to speak.
- Check your perception of what the person is trying to communicate.
- Interpret the data provided.
- Check if your own interpretation is correct.
- Express your own feelings.
- Express your own intentions.
- Suggest actions to bring the situation to resolution or problem into focus.

This model can also be applied when dealing with conflict.

When providing feedback, team members should:

- Not try to evaluate the other person.
- Describe.

- Not use labels.
- Speak for your own self, use “I” rather than “you.”
- Phrase the issue as a statement, not a question.
- Not exaggerate the statement of the facts and issues.

Active listening

- Listen to an entire point before commenting or interrupting.
- Listen with interest.
- Be in the moment, do not start thinking about your answer before speaker has finished.
- Allow everyone to fully present their views.
- Allow the person to finish before airing out our thoughts.
- Ensure the point has been completed and understood before moving on.
- Listeners must remember that no thought or idea is a bad one and should be considered.
- Understanding is more than listening.
- Use the words like "What I hear you saying is" when appropriate.
- Speaker should check for understanding.
- Poll each team member on the topic when needed.
- Ask someone from the group to summarize to ensure a group understanding is at hand.
- Ask for clarification if unsure.

Conflict resolution (ten rules for crowd control)

- Everyone is Equal (titles are left at the door).
- One Speaker at a time.
- One Subject at a time.
- Use Sentences.
- Binary: Yes or No (no gray areas).

- Unanimous agreement.
- Do not duck it (tackle tough issues and problems).
- No Speeches.
- Ideas, thoughts, positions, are important. Spelling and grammar will be corrected later.
- No interruptions (if someone leaves the session, they agree that they will abide by the conclusions reached by the team).

Consensus building

All team members must understand the decision, accept it, and can explain why the decided choice is the best. Requirements to do this are as follows:

- Time (dedicated to discussion and decision-making).
- Active participation of all team members.
- Active listening.
- Conflict resolution.
- Facilitation skills.
- Creative and open-mind thinking.
- Emphasize the positives.
- Find out how serious the negative are.
- Keep summing up the areas of agreement.
- Commit to action.
- Encourage all participants to have a full say.

Handling change

Two biggest mistakes people make when confronted with change are:

- Being a victim.
- Trying to control the uncontrollable.

Dealing with change involves

- Understanding individuals' fears.

- Understand reasons for resistance.
- Leaders must have a clear direction.
- Explain what is going to affect people.
- Adequate training

One of the biggest mistakes that are made in trying to introduce change is not understanding the reasons for resistance. What people don't realize when introducing change and communing up against resistance is the following:

People do not resist change, they resist being changed . . .

Culture

Building Trust

- By communicating your strengths and weaknesses in the work place to the group, people can find way to relate to the other members. Open communication should always be encouraged and welcomed regardless of the nature of the news. Members should maintain consistency—"walk the talk." You must prove your competencies by always doing your part of the work when you say you are going to do it. Remaining positive throughout this entire process will also help to grow the trust within the group.

Team Rituals

- Developing team rituals are important as it motivates the team to be the best that it can be. One ritual would be to acknowledge the accomplishments of the team. There is no greater satisfaction (not even money!) than recognition amongst your peers. Each team should brainstorm to develop their own rituals—as this will give commonality to the group and its members and spark enthusiasm in doing the job!

Diversity and Creativity

- Partnerships built on mutual empowerment and unconditional support ensures that diverse perspectives, ideas, and experiences are included. Optimizing diversity is extremely effective for increasing collaboration, performance, creativity, learning, and teaching. Optimizing each team member's uniqueness brings the power of diversity into your team.

Politics

People and Behaviour

- All members expected to be open minded to other's opinions.
- Challenge each other, but with respect.
- Support team atmosphere, "one for all and all for one."
- Majority rules.
- Have non-directed discussions so people can open up, get to know each other.
- Moreover, understand everyone's values and different perspectives.
- Evaluate the mix of team members to determine skills and competencies for problem solving and decision-making.

People demonstrate four distinctive behavioral styles. Listed below is a summary of each and the "Do's and Don'ts" on how to effectively manage and prepare you for such styles.

- With a *driver*, you need to be brief, specific and to the point. Don't chitchat. Come prepared to the meeting, plan your presentation to present facts clearly, ask specific "what" questions, if you disagree, take issue with facts not the person. You finish your business move along quickly. Don't waste their time, ramble on, leave loopholes, appear disorganized, messy, speculate wildly, direct or order them around.
- With an *expressive*, you must support their hopes, dreams, intentions, leave time for socializing, talk about goals and what is stimulating, deal with the big picture, ask for opinions and

ideas, offer special deals, extras and incentives. Do not try to legislate, be cold, aloof or tight-lipped, leave things hanging in the air; dream with them if time is of the essence, talk down to them, be dogmatic.

- With *amiables*, you must start with some personal comment to break the ice, show sincere interest in them as people, find areas of commonality, listen and be responsive, be non-threatening, casual, and informal, define individual contributions, provide back-up support. Don't rush headlong into business, stick to business constantly, debate about facts and figures, be patronizing, offer assurances you can't live up to.
- With *analyticals*, prepare your information in advance, be direct, stick to your knitting, present specifics and do what you say you will do, follow through if you agree, be accurate, realistic, provide tangible practical evidence. Try not to be disorganized, casual, informal, loud, fail to follow through, waste time, provide personal incentives, threaten, cajole, wheedle, coax, whine, or be manipulative.

Motivating Contributions

- “Bright Ideas Award” incentive program. If implemented, cash bonus payout.
- Team Recognition Program in the way of a plaque for all company associates to view.
- Newsletter updates on team's progress and assignments, acknowledging outstanding performers/heroes etc.
- Mutual accountability for success.

Task Allocations

- Appointed and unchangeable initiator, who will call on experts as required, i.e. Director or President.
- Depending on the emergency/disaster SME's will be appointed from all units with the most experience to lead the team
- Rotation of SME's will also be necessary depending on the emergency/disaster

Moreover, their skill sets.

- Whoever's department the emergency effects the most, will assume a "leadership role" in assisting the SME in assigning tasks.

Accountability

Measuring Effectiveness

- Establish period for first line response team to call each other. From first call of an emergency, the first line team has 30 minutes in which to contact all of the rest on their ERP team. All contact names and numbers, home, work and cell are to be documented. First line team then determines which department will respond. First line team determines if outside emergency personnel need to be notified. This could be fire police ambulance or military.
- The second line or departmental ERP team then steps into their action plan. Clear timelines are set out. They then have 30 minutes to be sure all of their team is on board and ready to roll out action plan.
- Depending on the emergency clear steps are set out to follow. Each phase will have a period established. A full ERP response plan will have an overall period. Example; In 24 hours all steps in the departmental ERP plan will have been implemented.
- All ERP plans will have periods. Examples would be:
 - All computers are down IT has 1 hour to have all main frames up and Running
 - Bad product has been shipped into the market place-all product must be off shelves in North America in 48 hours.
 - The team must be fully packed and assembled and at a specific location ready to go at 0800 for dispatch to the Tower Fire.

Rewarding Success

- KPI are set up on individual performance plans. It is part of a bonus calculation.

- The whole team depends on each other to complete the ERP plan and in turn achieve their individual goals.
- If the team pulls together and successfully completes the ERP plan in the period specified the success is measured.

See attached performance document.

Team TOP Group Management Evaluation 2004		Annual Base Salary	\$0
		Percentage of salary possible to be earned	10%
		Total \$ Possible	\$
Name:			
Date:			
Position:			
Performance Measure	Weighting % of total \$	Payout Potential	Actual Achievement
<hr/>			
1) Be part of a highly effective ERP Team Having achieved 100% on time ERP roll out	10%		
2) Other goals listed			
3) "			
4) "			
5) "			

October, 2003.

