



Candidate Resource and Assessment

BSBWOR402A

Promote Team Effectiveness



Whether as an individual, or as part of a group, real progress depends on entering whole-heartedly into the process and being motivated to make you a more deeply satisfied human being.

Focusing on your training needs



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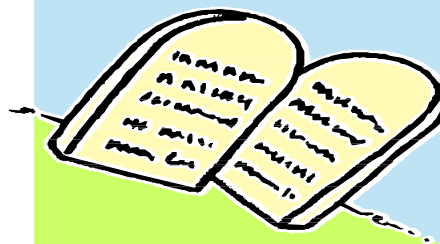
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"You're either part of the solution or part of the problem".

Eldridge Cleaver

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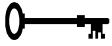
SAMPLE

Focus on

Your Area of Influence

Use considered risk taking in your 'grey' area

And others will follow you!

Legend	This course is divided into several sections of learning. Each section begins with the title of the element of the unit being taught, a quotation and a graphic related to content across the top of the page.
	This symbol indicates the beginning of new content. The bold title matches the content of the competency and they will help you to find the section to reference for your assessment activities.
	Activity: Whenever you see this symbol, there is an activity to carry out which has been designed to help reinforce the learning about the topic and take some action.
	This symbol is used at the end of a section to indicate the summary key points of the previous section.

Qualification Pathways



A goal without a plan is just a wish.

Antoine de Saint-Exupery

Qualification Pathways

This unit of competency is provided to meet the requirements of BSB07 Business Services Training Package although can be used in a range of different qualifications. The BSB07 Business Services Training Package does not state how a qualification is to be achieved. Rather, Registered Training Organisations are required to use the qualification rules to ensure the needs of the learner and business customer are met. This is to be achieved through the development of effective learning programs delivered in an order which meets the stated needs of nominated candidates and business customers.

Qualification Rules

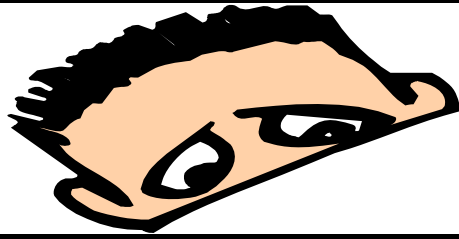
Qualification requirements include core and elective units. The unit mix is determined by specific unit of competency requirements which are stated in the qualification description. Registered Training Organisations then work with learners and business customers to select elective units relevant to the work outcome, local industry requirements and the qualification level.

All vocational education qualifications must lead to a work outcome. BSB07 Business Services Training Package qualifications allows for Registered Training Organisations (RTOs) to vary programmes to meet:

- Specific needs of a business or group of businesses.
- Skill needs of a locality or a particular industry application of business skills.
- Maximum employability of a group of students or an individual.

When packaging a qualification elective units are to be selected from an equivalent level qualification unless otherwise stated.

Introduction



"If learning comes through experience, it follows that the more one participates in guided experiences, the more one learns. Therefore venturing into uncharted waters - and experiencing the failures that may occur - is an important part of organisational learning."

Gould, DiBella, Nevis

Introduction

This unit of competency is all about being able to promote team effectiveness within a work team you have been involved with. It will help you with the skills you need to demonstrate competency for the unit *BSBWOR402A Promote Team Effectiveness*. This is one of the units that make up the Certificates in Business.

This manual is broken up into four distinct sections. They are:

1. **Plan to achieve team outcomes:** We will begin this manual by examining team planning, and what you need to do to ensure that your team will work together effectively.
2. **Develop team cohesion:** Then we will examine how you go about creating a team that is cohesive and that will work together effectively towards a set of goals and objectives.
3. **Participate in and facilitate work team:** In this section we will examine participation in teams and how you can encourage this.
4. **Liaise with management:** In this final section, we will examine communication in the context of team work and how you can use different communication methods to achieve required results.

At the conclusion of this training you will be asked to complete an assessment pack for this unit of competency. The information contained in this resource will assist you to complete this task.

On conclusion of this unit of competency you will have demonstrated your ability to develop team plans to meet expected outcomes, lead the work team, and proactively work with the management of the organisation.

SAMPLE

BSBWOR402A/01

Plan to Achieve Team Outcomes



“Love - incomparably the greatest psychotherapeutic agent-is something that professional psychiatry cannot of itself create, focus, nor release.”

Gordon Allport



Identify, establish and document team purpose, roles, responsibilities, goals, plans and objectives in consultation with team members

Support team members in meeting expected outcomes

The term team is often used rather benignly by managers to mean a ‘group’. But a team is more than simply a group. A team is an on going group of individuals working together towards a common goal (even if they are not in constant contact with one another). The essential difference between a group and a team is the achievement of a common goal, and the fact that teams are usually self-managed, that is there is no supervisor or manager directing their every action. In a group, you usually simply have a group of individuals – but there is no sense of purpose among the members.

They are not working towards a common goal, there is no shared purpose. As a manager, you will be asked to take responsibility for the work of teams within your department in order to ensure that they are fully aware of their purpose, role, responsibilities and accountabilities. It will be your task to work with your team to develop these factors and this will often be accomplished through the creation of a terms of reference document for the team.

Terms of Reference

A Terms of Reference document has evolved to cover many things. The Terms of Reference set for any team provide them with the scope that has been allowed to a team conducting an inquiry of any kind. Terms of Reference has come to be used in almost a generic sense to cover the base document used as a guide for a wide range of activities. Often terms of reference will be produced in order to guide a team in their work towards conducting:

- Investigations
- Reviews of systems or projects
- Project management
- Implementation of plans
- Development of plans (strategic & otherwise)
- Regular group meetings

The Terms of Reference that is provided to a team needs to state clearly and specifically the permitted and possible extent to which the team may work. In the case of quality management for example, this may involve what aspects of the quality plan are being covered, or what aspects of the organisation are being investigated. For a review you need to specify exactly what is being reviewed, and make it clear what is not under review so that the team does not exceed its boundaries in any way. The Terms of Reference should enable a project team to:

1. Set boundaries on the project.
2. Know what is and isn't within their jurisdiction.
3. Understand the context in which the terms of reference have been framed.
4. Have a clear idea of where they should begin.
5. Have a clear idea of outcome/product.

Terms of Reference should include:

- **Mission Statement:** A short statement, preferably one or two sentences which explain the mandate given to the team.
- **Problem Statement:** Defines the problem in 2 or 3 paragraphs and explains simply what service/product/operation/issue is affected and how the problem is evidenced. This is often the most difficult section to write, yet it is essential to articulate the problem that caused the review/project to be initiated. Unless the problem is stated, it will not be known if the problem has been addressed when the process of review is complete.
- **Boundaries:** This section, of about one paragraph or a series of bullet points, describes where the process/system/operation/issue to be studied begins and ends. Also include a statement of the team's authority to recommend and/or implement change; and any powers given or delegated to them. It is here that mention needs to be made of the systems, policies, procedures, legislation, etc. that are outside the scope of consideration by the team.
- **Specific Issues to be Addressed:** This section is the most important because it represents the work which will be actually undertaken by the team. In preparing this list, clarity is essential to provide focus and direction for the team/s. Be specific.
- **Desired Outcomes/Outputs:** Though the Terms of Reference should not predict what the outcome will be it is essential to outline the end product of the review project. This section must be strictly linked to the problem which is the catalyst for the review/project. These can be added where possible and if necessary. Only one paragraph should be necessary to identify and localise the expected outcomes.
- **Timeframes:** Beginning and ending times for the entire project. Any significant or obvious checkpoints along the way. Whether or not timeframes are negotiable and under what circumstances.
- **Resources:** Mention what resources are available to the team and how they will be accessed (For example, computing/word processing, accommodation, etc). Need for training of team members and how this will be provided. Available budget for the project. Materials and supplies to be accessed.

Types of Team

When writing a team's terms of reference and objectives, it is useful to determine exactly what form a team will take. There are various types of team. The most common include:

- **Problem Solving Teams**

A problem solving team is a type of temporary team that is made up of experts in a specific area. The team members generally meet in order to solve a specific problem and once the problem has been effectively resolved, the team will disband.

- **Cross-Functional Teams**

This type of team generally forms on a permanent basis. It is their responsibility to deliver a product or service. They will generally form from the instigation of the product or service and will work on design, manufacturing, sales, and support for the product or service. Generally such a team is formed from a wide range of areas of an organisation.

- **Work Teams**

Work teams form all the time, generally they form to work on achieving specific results for the organisation. A subset of the work team is a self-managed work team. This type of team forms when a team is provided with the power to make its own decisions.

- **Management Teams**

A management team will be made up of managers from a range of functions in an organisation – they work together in order to coordinate the work of the various departments in order to implement strategies within the organisation.

- **Quality Circles**

A quality circle is a type of team that will generally meet for a short time each week – and during those meetings the team will identify, analyse and resolve problems that exist within the organisation – because they are known as a quality circle, these problems will often examine systems and workflow. Unlike many other teams, the members of a quality circle will often require specialised training in problem solving and the methods of quality management in order to participate in the process effectively.

Team Objectives

A further aspect of team planning that is crucial to success is to define the team's overall objectives. You can think of objectives as being a road map. The ultimate destination must be set – if a team is to develop a way of getting there. If you do not set an effective objective (or objectives) for a team, they will not have any means of gauging what it has to do, why it should be doing it, and how to best meet these needs.

Your objectives as a team are the specific set of goals you will be working towards. In order for your outcomes to be effective they must be clear, concise and documented in an agreed format.

- **Clear**

When you are writing the outcomes for your team, clarity of expression is vitally important – if you are not completely clear, you may find that your objectives will not be of any assistance to your team at all. It is only when your team members understand the outcomes that they are working towards that they will actually be able to work towards them – and hopefully achieve them. So, you should ensure that the outcomes that you write are clear enough to allow for all attendees to fully understand the outcomes required. Some ways that you can accomplish this are:

- **Avoid the use of overly complex terms and jargon.** Jargon is particularly only easily understandable by those with a good knowledge of the topic – this may alienate other team members. For example pilot terms such as Vr, V1 and V2 are likely to be easily understood – but is an airline manager working to improve systems likely to understand them?
- **Attempt to write in plain English.** We could write a whole manual just on the process of writing in plain English – however, briefly it tries to eliminate confusing terms and long-windedness from writing. For more information on plain English you may like to refer to <http://www.plainenglish.co.uk/>
- **Include measurable terms in your outcomes.** This assists you in being specific rather than vague.

Consider the following:

"This team is required to improve the efficiency of the task"

What does "improve" mean? By how much? What task? This is vague, and needs to be tightened up in order to be clearer.

"The team is required to improve the level of production of widgets by 25%"

This objective is better, as it states specifically what is required and defines the "improve" from the previous outcome.

- **Concise**

In many respects clarity of expression and being concise go hand in hand. If you are concise, generally your writing can be seen as being tight, to the point and clear. Try to keep each outcome for the team to one or two sentences. If your outcome is longer than this, re-read it to ensure that all the information in a specific outcome is required. You will often find when writing an outcome that you repeat single specific outcome two or three times in different words. Being concise also assists the readability of anything that you write. Creating a list of long outcomes, which is two pages long, is less likely to be read by the team participants than creating a short concise list of outcomes. Therefore, by creating a shorter, more concise list is likely to lead to more effective meetings, as everyone will be more likely to read the outcomes.

- **Documented in An Agreed Format**

You need to ensure that your outcomes and objectives are written are documented in a manner by which your organisation is happy with. Organisational requirements are always a crucial consideration in everything you do in an organisation – this is particularly true of documentation. Documentation may be required for legal purposes, quality management reasons or for internal administration. This means that you need to ensure that you work to ensure what you have written is in the right format for your organisation. Often times you will find that the use of bullet points is a very useful means of documenting the objectives and outcomes for your team – as they are easy to read and understand.



Objectives are a teams way of ensuring that your team gets to where it wants to go

- **Other Considerations**

While these are the most important considerations when developing objectives for your team, there are some other factors that you need to consider carefully. These include:

- You should also attempt to make any outcomes that you prepare for the team to be **realistic**. Do not attempt to place too higher expectations on your team. It is better to create outcomes that slightly underestimate what you will achieve, than define outcomes that you couldn't possibly achieve.
- It is important to ensure that your objectives are in **measurable terms**, as this will allow you at a later stage to begin evaluating the performance of the team against some concrete measure.

Supporting the Team to Achieve

As the manager or team leader, it is your role to ensure that your team is working towards its goals that have been set for it. You need to provide the team with the support it needs to reach its goals – and achieve what it is meant to achieve. Early in the process of bringing your team together you generated a list of outcomes or objectives towards which the group will be attempting to move towards – we outlined this previously in this section. One of the significant issues involved in working with a team is the ability for the team to move away from the central issues and what they are actually required to accomplish. This is often much more prone to happen in team meetings as often they can be quite social, so idle chatter, joking around and discussion of problems other than the one in question are very common. While you should not discourage social interaction in a group (it is a good way to assist in reducing conflicts, and building up team or group morale) it is vital that the group's progress is monitored to ensure that the objectives are likely to be met.

In order to monitor the progress of your team, you need a monitoring tool to manage their progress while the work is being undertaken. It is no good monitoring progress once the job is complete. By that time it is simply too late – and mistakes have been made and they are not able to be easily changed. Through the use of *On-Track* and *Off-Track* Indicators, a team is able to monitor its progress while the process is being undertaken. This allows it to resolve any issues in advance and before they become major problems.

Think of the objectives that you have set as your overall destination – what you want to achieve... Using our road map analogy – they are where you want to go. On and off track indicators however are slightly different. They dictate the route that you should be taking. What roads should we take? How should we get where we need to go? We can look at these indicators and see if we are heading towards our destination – or whether we are heading in the wrong direction and in need of some changes to make sure we get back on the right road.

By using both *On-Track* and *Off-Track* Indicators we have an important monitoring and review tool that can be used as often as we need. But what do these indicators need to be? How can we be sure that they will be successful? Like the objectives you wrote earlier in the process, *On-Track* and *Off-Track* Indicators must be specific and observable. They need to clearly state what needs to be achieved and you must actually be able to measure and observe what is taking place in order for you to be able to determine whether you are meeting your objectives. But, while objectives target the point that the work will be finished (through having timelines), *On-Track* and *Off-Track* Indicators leave those issues open.

Because you need to monitor any process your team is working on long before results are achieved, you need to set *On-Track* Indicators by determining what you hope will visibly change during the time your team's initiative is moving forward. You should avoid focusing on the results you expect to occur after the final actions of the team - these are what your objectives are for. Instead you should look for any indicator that will change when your team is moving in the right direction - moving towards the final goal. You should try to determine three or four of these measures to monitor and these will allow you to determine when your team is heading in the right direction and when there are problems that need to be resolved in order to get your team back on track.

As well as establishing a list of your *On-Track* Indicators, it is just as important to establish a list of your *Off-Track* Indicators, that is indicators and measures that will allow you to determine when your team is not heading in the right direction. This is just as important as determining *On-Track* Indicators. Your *Off-Track* Indicators will allow you to establish when things are going wrong – and will allow you to make changes quickly to address these problems.

Let's assume that your team has been tasked with introducing a new operating system onto all your computers in your workplace. There is a move from using traditional Windows XP to a more radical – but entirely more cost effective Linux system, the *On-Track* Indicators might be:

- Having employees attending training sessions that introduce the new operating system.
- Any questions that your team has are being answered by the operating system's manufacturer.
- Software and hardware that is compatible is being installed on the computers.

On the other hand the *Off-Track* Indicators that you write may include:

- You begin to hire new staff on the basis that they are familiar with Windows XP systems.
- Staff are refusing to use the new system because it is too complex.
- Software for Windows XP is purchased.

By using these indicators, you as a manager are able to help support the achievement of goals by ensuring that you and your staff are kept well informed of the progress towards specific goals that is being achieved. As a manager, you should ensure that you frequently monitor *On-Track* and *Off-Track* Indicators to ensure that you are kept aware of progress and can be of assistance where problems are seen developing.

Indicators such as this are particularly useful in determining how well you are moving towards the desired objective, and it provides you with guidance about how well the team is operating, while it is working, which allows you to make changes before any actions or decisions become final and are implemented in the workplace. You may find that the terms of reference for a team are a good place to start when writing your indicators – as they provide you with a good discussion of the areas that may or may not be addressed by the team – so *Off-Track* Indicators could include areas outside of the terms of reference.

These indicators should also be used by you as a manager when meeting with your team to review the current progress of the project. You can use it as an opportunity to explore further possibilities for improvement. By monitoring the progress you can solve issues with the team and ensure that you are moving quickly towards the right overall objectives.

Supporting Your Team to Grow

Teams are made up of a range of individuals, each of whom has their own special talents and skills. As a manager, you need to encourage the team to use the skills and talents of other individuals in the group rather than simply relying on themselves to complete the tasks.

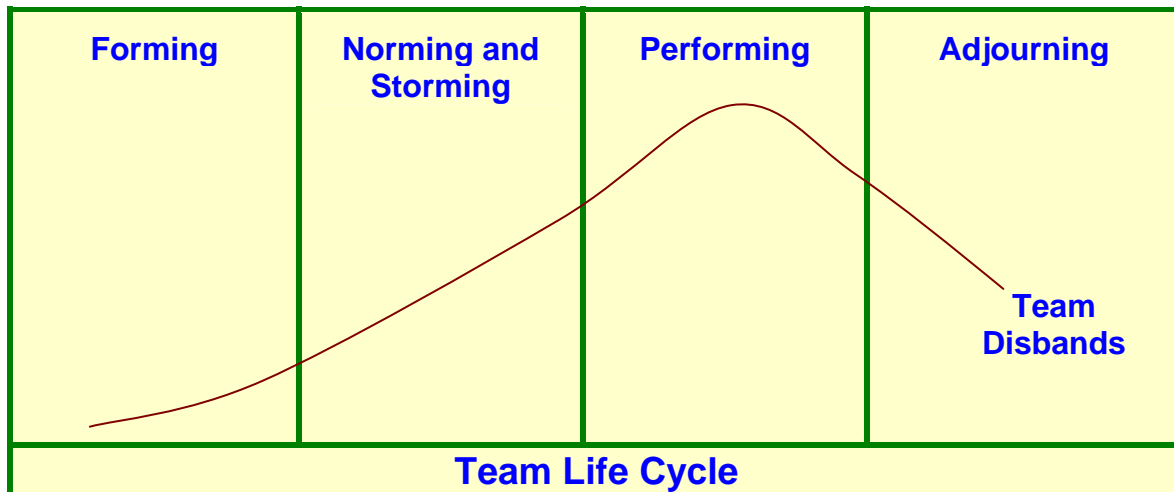
Part of building the winning team is having some group meetings. Meetings, or even parties or celebrations, with as many people as possible from the entire organisation, help build a feeling of solidarity throughout the organisation.

It is also important to have everyone participate in smaller group meetings where some work is done or some decisions are made. This makes people feel that they aren't just part of some big group, but that they are an active, important part of a team. This is particularly important in attempting to get teams to use each other's skills and competencies.

Attempting to build an atmosphere where the entire team is rewarded for success rather than individuals also assists in ensuring that the team will use each other's skills to the team's advantage. Of course it is often difficult for team members to be aware of each other's skills, and so it may also be useful to have a "get to know the team members" session, where all team members take the opportunity to introduce themselves and their previous jobs, skills, responsibilities and knowledge to the team, in this way they can learn about each other in a positive and welcoming environment.

The Formation of a Team

All teams pass through a series of stages – and as a manager you can assist your team to grow by carefully examining each of these stages and providing appropriate guidance and support along the way.



In this diagram you will note that most of the work is undertaken at the performing stage. Norming and storming have been put together because they often occur simultaneously.

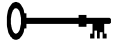
- **Forming:** At this stage, you simply have a group of strangers – this group is being asked to come together as a team to carry out a specific task or activity in the work place. You will find that your team is likely to be anxious, confused and unsure of exactly what it is required to do. Therefore you need to work with your team members developing a sense of purpose, what each members relationship is to each other (and the teams relationship to the organisation as a whole).
- **Storming:** At this stage there is conflict and in-fighting – your team members will be spending time developing their own sense of identity looking for differences in their values and working styles. Your team members may challenge leadership and look to informal leaders. As a manager – you need to encourage a certain amount of storming as it allows your team to develop its sense of identity – but as always there is a level at which it becomes unacceptable and working to keep the fighting below this level is critical to preventing your team from imploding.
- **Norming:** Once a team has completed the storming stage, Norming will begin. At the Norming stage you need to assist your team to develop codes of behaviour, rules and procedures for the teams operation. We will examine this in more detail in the next section. Norming allows the normal levels of acceptable behaviour in the group to be established, and allows the team to determine exactly how things are to be achieved.
- **Performing:** The previous three stages of team development have focussed on getting the team developed. Once the team is well developed, they begin actually performing the work that they have been brought together to accomplish. As a manager, your role at this stage is to oversee the work that is being undertaken, ensuring that the team is staying on track and working towards appropriate goals and objectives.
- **Adjourning:** All good things come to an end, and some teams may disband after their objectives have been accomplished (although you should note that some work teams will not officially disband rather members will join and leave during the team's existence). As a manager you may find that an official closing celebration for your team members can help resolve issues to loss from disbanding the team. Also security in the form of letting team members know what their future holds is also of importance.



Activity One – Team Objectives

Examine your team's goals and assess them according to how clear, concise, specific, measurable and time related they are.

SAMPLE



Key Points Section 1

- In order for a team to be most effective, it must have:
 - A set purpose.
 - Members who have roles and responsibilities assigned and clearly communicated to them.
 - Goals and objectives that are clear, concise, specific, measurable and time bound.
- As team leader it is your role to support team members in achieving their expected outcomes.

SAMPLE



Section 1 - 'True' or 'False' Quiz



T	F	A team is merely another word for group.
----------	----------	--



T	F	The Terms of Reference set for any team provide them with the scope that has been allowed to a team conducting an inquiry of any kind.
----------	----------	--



T	F	Terms of reference do not need to set boundaries.
----------	----------	---



T	F	A problem solving team is a permanent team.
----------	----------	---



T	F	A management team will be made up of managers from a range of functions in an organisation.
----------	----------	---



T	F	Objectives should not be clear, as this allows team members to interpret what is required of them.
----------	----------	--



T	F	Teams will not always stay on track.
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T	F	On and off track indicators are a tool that allows a manager to ensure a team is working towards appropriate goals.
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T	F	Teams are made of a range of individuals, each of whom have their own special talents and skills.
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T	F	At the performing stage, a team will perform most of its work.
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