

Taking the Pulse of Your Team¹

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(Originally published in [Applications and Tools for Creating and Sustaining Healthy Teams](#), 2011)

Just like humans, teams need regular checkups to ensure that they are healthy and performing effectively. Regular checkups will catch deviations and enable a corrective course of action. When teams begin to lose their ability to function at a high level of effectiveness, shown by declining performance, they are probably going through some phase of the team development down-cycle often cited in the Tuckman² team model: Forming–Storming–Norming– Performing.

Many teams never quite pull out of this downward cycle and continue to exist as a collection of individuals masquerading as a team. For these pretenders, they too often embark to a "Sargasso Sea"³ of lost teams, maintaining the posture but not meeting the expectations of members or management. This decline may be attributed to a disconnect between performance expectations and organizational reality. Many managers fail to differentiate between what teams are supposed to do and what the team is really doing.

For many, the principles and expectations that management has of teams are not necessarily clear or even shared by those on the front-line. Another possibility is that some of the principles used to define the team model may not be relevant to a particular team or department. For this reason, developing clear, discrete, time-bound, and measurable AIM statements is crucial. A Team Charter can be created as the guidance document and official work contract for launching the team. The Team Charter is a document that delineates the strategic goals, boundaries, measures of success, constraints/limits, and available resources within which the team must operate as it investigates the problem assigned. In addition, regular reports and project reviews help to keep teams on track and aligned with management's expectations. Chapter 13 details a variety of team reporting formats that can be used to keep open communications flowing between management and the team.

This article presents two diagnostic instruments to help the facilitator or coach monitor a team's health. The first instrument is a checklist of tasks and processes that a team should complete in most teaming processes and is shown in Table 1. The task side needs to be monitored along with the behavioral side to ensure a balance in the team's health. This table of team tasks and processes is not exhaustive but illustrative. Individuals using this table should modify it to fit the needs of their team's problem by adding additional task items.

¹This article is based on an earlier work: Kuras T, Moran J. 20 Questions to Ask Your Teams. *The Quality Management Forum*. 1997; 23:(4): 4-5.

²Tuckman B. Developmental sequence in small groups. *Psychological bulletin*. 1965; 63: 384-399.

³ Heller R. *A Sea Within a Sea: Secrets of the Sargasso*. Price Stern Sloan, 2000.

Team Tasks:	Yes	No	N/A
1. Team charter developed			
2. Team sponsor reviewed charter with team			
3. Team members selected			
4. Team leader selected			
5. Team facilitator assigned			
6. Team understands the PDC/SA Cycle			
7. Team trained in QI tools and techniques			
8. Team meetings scheduled and developed			
9. Regular team meeting held			
10. Team minutes published			
11. Team followed the PDC/SA cycle			
12. Team is doing rapid cycle PDC/SA			
13. Team and sponsor held regular review meetings			
14. Team completed their assigned project			
15. Team develop a Gantt chart of key implementation milestones			
16. Project solution implemented and key deliverables achieved			
17. Regular communication plan established with team sponsor and organization on progress			
18. Team established realistic improvement targets			
19. Team collected and used data			
20. Final report issued to team sponsor			
21. Team instituted controls to hold the gains			
22. Team made a handoff to those who own the process to institute change			

Table 1: Team Process Review Checklist

To check on the behavioral health of a team, the questionnaire shown in Table 2 has been developed to help a facilitator, team leader, or coach monitor a team with 20 different vital signs. This questionnaire is designed to assess a team’s behavioral performance over time; it can be used to establish a baseline and then given at regular intervals to assess how the team is functioning. From time to time the questionnaire may reveal during some areas needing attention; they may be minor like a sprain or major like a fracture. The facilitator and team leader need to work together to decide what is the “best medicine” to help the team recover to a productive state. The corrective course of action chosen needs to be communicated to the team members so that they will understand why it is necessary and what outcomes to expect. The team leader and members have to be active participants in the team’s recovery.

Team Evaluation Survey

Date: _____

Answer each question by entering the number below that best describes the current team:

1–Strongly Disagree 2–Disagree 3–Agree 4–Strongly Agree

Evaluation Questions	1	2	3	4
1. As a team member, I am committed to making changes.				
2. I clearly understand the purpose of my team.				
3. The team leader has a process for sharing information with members.				
4. Our team has the right members to be successful.				
5. As a team member, I understand how our work affects the larger goals of our department.				
6. Our team is recognized for its accomplishments.				
7. Team members openly express their ideas and opinions.				
8. Team members have a means to see progress toward important objectives.				
9. My team members want to be on our team.				
10. I want to be on our team.				
11. Our team is able to make thoughtful decisions that all team members support.				
12. Our team can have productive meetings without the influence of a team leader.				
13. Our team members trust and respect each other.				
14. Team members express disagreements constructively.				
15. Team members willingly take on new responsibilities.				
16. Team members follow through on decisions and action items.				
17. Our team has established a set of ground rules and guidelines for team performance and behaviors.				
18. Team members are encouraged to express different points of view.				
19. Our team makes time to evaluate how effectively they work as a group.				
20. Members of our team are held accountable for their responsibilities and assignments.				
Total Responses				

Table 2: Team Evaluation Survey

Scoring can be performed in a number of ways:

1. Add up the scores for the items scored as a 1, 2, 3, or 4 for all of the team members and observe what the data look like. If they average 3 or more, then the team is progressing

on the right course. Items scoring below a 3 should be analyzed to determine if an intervention is necessary.

2. Average the scores for the team members and indicate for each question the average and the high and low scores. This process offers a snapshot of whether any team members are below the average - which should be investigated. Most of the members may be in agreement that the team is functioning well, but one or two may see it differently.
3. Average the scores for each question and connect the averages with a line; it will look like an electrocardiogram of the team.

The main aspect to notice is deteriorating trends over time and individual outliers that need to be addressed.

Summary:

The issue of effective teaming is a complex topic. Leaders in organizations that have teams must use an assessment process regularly so that they can check the pulse of their teams. This assessment process is a form of team-based preventative medicine by checking the vital signs. This checking process will help to guide management and serves as an effective preventive measure for maintaining team performance.

Too often teams struggle and fail because of unclear performance expectations that management has of teams. It is not hard to find a "disconnect" between how teams view themselves and how managers and supervisors view the team. This instrument can help to identify the expectation gaps between reality and organizational views of team performance.