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## **A charter can help your company team work more effectively**

By **DANIEL SCHROEDER**, for *Small Business Times*

### **Question:**

**I am the leader of a four-person management team. The other three members are responsible for sales, operations, and research/development, respectively. Each of us is a seasoned, industry-experienced veteran. We are relatively new to working together, though. We have worked together as a management team for only about 2-1/2 years. The issue I want some help with is our lack of cohesion and generally strained communications. The worst offender is the R&D manager. He is highly intelligent and often uses his advanced degrees and technical know-how to put the rest of us down. He is a know-it-all who is never wrong. He also has no problem pointing out where we fall short. His employees hate working for him, and we have lost two high-potential employees in his work area in the last**

**month. What can we do to start connecting more as a management team? What can I do with the R&D manager to get him to be more of a team player?**

### **Answer:**

As you describe it, it sounds as if your management team and the individuals that comprise it have strong technical skills. You mention the fact that each of you is a seasoned veteran. At the same time, you describe a management team that does not get along very well.

Additionally, you have at least one member (i.e., the R&D manager) who is having difficulty in his own functional area (i.e., employees are quitting because they do not like to work for him). Further, although you don't explicitly mention it, I must assume that you do not have a strong foundation in terms of basic team functioning. I wonder if you have taken the time to define your team's role in relation to the organization at-large?

In my judgment, a two-pronged attack is necessary in this situation. One issue to be confronted is the nature of the management team dynamic. The second issue is the R&D manager and his approach to his work. Ideally, these issues need to be confronted in synchronous fashion. This means doing work at both the team and individual levels, at the same time.

First, let's examine the management team aspect. In my opinion, what needs to be pursued here is a team charter. The management team needs to define and delineate the process (i.e., the "how") by which it carries out its work (i.e., the "what").

Given your technical capabilities, I'm sure you're more comfortable with content rather than process issues. Yet, this is why you are in the position that you are in. My bet is you are probably more comfortable (and effective) working independently than collaboratively. So, until you develop some small group skills, you will operate more

as a collection of individuals than as a true team.

A team charter can go a long way toward giving you a framework by which to operate. Typical components of a team charter include:

- Vision: What is the ideal future state to which the team aspires?
- Mission: What is the purpose of the team? What does upper management (and other key constituents) expect from it?
- Responsibilities: What are the team's goals? How do those goals relate to those of the organization? What does the team need to do to reach its goals? What must individuals do to ensure that the team reaches its goals?
- Boundaries: What are the parameters in which the team operates? What kinds of decisions are made inside and outside of the team?
- Ground rules: What are the team's "rules of engagement?" How will conflicts be resolved?

— Meetings: How often, for what duration and where will the team meet? Who will play the important roles of facilitator, process checker, scribe, and timekeeper?

In essence, the team charter will give you a "road map" for conducting future interactions. No longer will you be "winging it." It will set some expectations for the team as a whole. It will be the basis for answering the question, "How are we doing?"

Now, what about the R&D manager? Typically, I would recommend a three-part course of action, involving: 1) data gathering; 2) gap analyses; and 3) identification of an action plan.

Let's look briefly at each of those steps.

1. Data gathering: Gather data to paint a comprehensive picture of what he is (and is not) doing. Typically, I would suggest that a couple of different data sources be used, including:

Performance data: Measures of job output, productivity, etc.

360-degree data: Self-, boss- and peer-derived impressions of his behavior, normally gathering using a formal survey instrument.

Norm-referenced data: At ODC, we call this an individual profile or a job trait assessment. It is a behavioral profile derived from validated questionnaires and inventories that offers between-persons com-

parisons (i.e., "How does this person compare with others in similar assignments?").

2. Gap analyses: How do the data compare with various expectations and/or perspectives?

3. Identification of action plan: On the basis of the gap analyses, what alternative courses of action exist? What are the costs and benefits that attach to each? What is the likelihood that a given alternative will "work?" What consequences or carryover effects attach to each alternative?

In my experience, one of the following three courses of action is likely to be applicable in the case of your R&D manager: 1) have him remain in his present assignment, but engage in a program of skill building (perhaps through the use of an external coach) to bring his interpersonal skills into better alignment with his technical skills; 2) have him remain with the organization, but transfer to an independent contributor role with no supervisory accountability where he can make use of his best skills-his technical capabilities; 3) terminate him from the organization because the gap analysis data reveals that his performance deficits outweigh his positive contributions.

In the final analysis, the old adage, "A chain is only as strong as its weakest link" applies in this case. In your situation, the weak link has to do with interpersonal deficits. This is true at both the management team level (i.e., the lack of effective interpersonal process) and the individual level (i.e., your R&D manager's inability to get along with either the management team or his direct reports).

So, ultimately, my advice to you is, "Build your 'soft' skills so that you can make better use of your 'hard' skills."



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