



**ATLANTA CHALLENGE**

Building extraordinary teams and leaders

# SITUATIONAL LEADERSHIP





## 4 STAGES OF TEAM DEVELOPMENT - QUESTIONNAIRE

Next to each question, indicate how often your team displays each behavior by using the following scoring system:

1 = Almost never    2 = Seldom    3 = Occasionally    4 = Frequently    5 = Almost always

1. \_\_\_\_ We try to have set procedures or protocols to ensure that things are orderly and run smoothly.
2. \_\_\_\_ We are quick to get on with tasks and do not spend too much time in the planning stage.
3. \_\_\_\_ Our team feels that we are all in it together and shares responsibilities for the team's success or failure.
4. \_\_\_\_ We have thorough procedures for agreeing on our objectives and planning the way we will perform our tasks.
  
5. \_\_\_\_ Team members are afraid or do not like to ask others for help.
6. \_\_\_\_ We take our team's goals and objectives literally, and assume a shared understanding.
7. \_\_\_\_ The team leader tries to keep order and contributes to the task at hand.
8. \_\_\_\_ We do not have fixed procedures; we make them up as the task or project progresses.
  
9. \_\_\_\_ We generate lots of ideas, but we fail to listen thoroughly and reject some without fully understanding them.
10. \_\_\_\_ Team members do not fully trust each other and closely monitor others who are working on a specific task.
11. \_\_\_\_ The team leader ensures that we follow the procedures, do not argue, do not interrupt, and keep to the point.
12. \_\_\_\_ We enjoy working together; we have a fun and productive time.
  
13. \_\_\_\_ We have accepted each other as members of the team.
14. \_\_\_\_ The team leader is democratic and collaborative.
15. \_\_\_\_ We are trying to define the goal and what tasks need to be accomplished.
16. \_\_\_\_ Many of the team members have their own ideas about the process and personal agendas are rampant.
  
17. \_\_\_\_ We fully accept each other's strengths and weakness.
18. \_\_\_\_ We assign specific roles to team members (team leader, facilitator, time keeper, etc.).
19. \_\_\_\_ We try to achieve harmony by avoiding conflict.
20. \_\_\_\_ The tasks are very different from what we imagined and seem very difficult to accomplish.
  
21. \_\_\_\_ There are many abstract discussions of the issues, which makes some members impatient.
22. \_\_\_\_ We are able to work through group problems.
23. \_\_\_\_ We argue a lot even though we agree on the real issues.
24. \_\_\_\_ The team is often tempted to go above the original scope of the project.
  
25. \_\_\_\_ We express criticism of others constructively.
26. \_\_\_\_ There is a close attachment to the team.
27. \_\_\_\_ It seems as if little is being accomplished with the project's goals.
28. \_\_\_\_ The goals we have established seem unrealistic.
  
29. \_\_\_\_ Although we are not fully sure of the project's goals and issues, we are excited and proud to be on the team.
30. \_\_\_\_ We often share personal problems with each other.
31. \_\_\_\_ There is a lot of resistance to tasks, and quality improvement approaches.
32. \_\_\_\_ We get a lot of work done.



## 4 STAGES OF TEAM DEVELOPMENT - SCORING

Next to each survey item number below, transfer the score that you give that item on the questionnaire.  
When you have entered all the scores for each question, add up the total for each of the four columns.

1.	_____	2.	_____	4.	_____	3.	_____
5.	_____	7.	_____	6.	_____	8.	_____
10.	_____	9.	_____	11.	_____	12.	_____
15.	_____	16.	_____	13.	_____	14.	_____
18.	_____	20.	_____	19.	_____	17.	_____
21.	_____	23.	_____	24.	_____	22.	_____
27.	_____	28.	_____	25.	_____	26.	_____
29.	_____	31.	_____	30.	_____	32.	_____
TOTAL	_____	TOTAL	_____	TOTAL	_____	TOTAL	_____
	<b>FORM</b>		<b>STORM</b>		<b>NORM</b>		<b>PERFORM</b>

- The highest of the four scores indicates which stage you perceive your team to normally operate in. If your highest score is 32 or more, it is a strong indicator of the stage your team is in.
- The lowest of the three scores is an indicator of the stage your team is least like. If your lowest score is 16 or less, it is a strong indicator that your team does not operate this way.
- If two of the scores are close to the same, you are probably going through a transition phase.
- If you score high in both the Forming and Storming phases then you are in the Storming Phase
- If you score high in both the Norming and Performing phases then you are in the Performing Stage
- If there is only a small difference between some totals, then this indicates that either you don't have a clear perception of the way your team operates, the team's performance is highly variable, or you are in the storming phase which can be extremely volatile with both high and low points.



## 4 STAGES OF TEAM DEVELOPMENT



### FORMING

1. We try to have set procedures or protocols to ensure that things are orderly and run smoothly.
5. Team members are afraid or do not like to ask others for help.
10. Team members do not fully trust each other and closely monitor others who are working on a specific task.
15. We are trying to define the goal and what tasks need to be accomplished.
18. We assign specific roles to team members (team leader, facilitator, time keeper, etc.).
21. There are many abstract discussions of the concepts and issues, which makes some members impatient.
27. It seems as if little is being accomplished with the team's goals.
29. Although we are not fully sure of the project's goals and issues, we are excited and proud to be on the team.



### STORMING

2. We are quick to get on with the task at hand and do not spend too much time in the planning stage.
7. The team leader tries to keep order and contributes to the task at hand.
9. We generate lots of ideas, but we fail to listen thoroughly and reject some without fully understanding them.
16. Many of the team members have their own ideas about the process and personal agendas are rampant.
20. The tasks are very different from what we imagined and seem very difficult to accomplish.
23. We argue a lot even though we agree on the real issues.
28. The goals we have established seem unrealistic.
31. There is a lot of resistance to tasks, and quality improvement approaches.



### NORMING

4. We have thorough procedures for agreeing on our objectives and planning the way we will perform our tasks.
6. We take our team's goals and objectives literally, and assume a shared understanding.
11. The team leader ensures that we follow the procedures, do not argue, do not interrupt, and keep to the point.
13. We have accepted each other as members of the team.
19. We try to achieve harmony by avoiding conflict.
24. The team is often tempted to go above the original scope of the project.
25. We express criticism of others constructively.
30. We often share personal problems with each other.



### PERFORMING

3. Our team feels that we are all in it together and shares responsibilities for the team's success or failure.
8. We do not have fixed procedures; we make them up as the task or project progresses.
12. We enjoy working together; we have a fun and productive time.
14. The team leader is democratic and collaborative.
17. We fully accept each other's strengths and weakness.
22. We are able to work through group problems.
26. There is a close attachment to the team.
32. We get a lot of work done.



# 4 STAGES OF TEAM DEVELOPMENT

Combining the Teamwork Compass® and Situational Leadership

<p><b>TEAM PHASE</b></p> <p><i>What's going on within the team.</i></p>	<p><b>FORM</b></p> <p>The team is coming together, getting to know each other and the leader. Everyone is playing it safe, for now. <i>(New teams, merged teams, new members or new leader.)</i></p>	<p><b>STORM</b></p> <p>Frustrations with the system come out. Thinking as individuals not as a team. Personal agendas rather than team cohesion. <i>(Cut-backs, merged teams, new members or new leader.)</i></p>	<p><b>NORM</b></p> <p>The team is cohesive, the kinks have been worked out, everyone is on the same page and supporting how the work gets done. Working and thinking as a team.</p>	<p><b>PERFORM</b></p> <p>The team has a high level of trust and ownership. Problems are handled quickly and positively. The team is in a state of flow with high morale and dedication.</p>
<p><b>LEADER'S ROLE</b></p> <p><i>Where the leader should focus.</i></p> <p><i>Dangers to anticipate.</i></p>	<p><b>DIRECTING</b></p> <p>The leader sets the stage for the team's mission, puts key foundations in place. Establishes the goals, standards and key processes. Builds trust.</p> <p>Abandonment. Losing good people. Not having a clean start. Compromising standards to get acceptance.</p>	<p><b>COACHING</b></p> <p>Make sure everyone is heard. Explain decisions. Bring ideas and concerns into the open. Make it safe to ask questions. Maintain positivity.</p> <p>Abandonment. Losing good people. Silos, solos, isolation. Passive-aggressiveness. Sabotage.</p>	<p><b>FACILITATING</b></p> <p>Take a step back and let the team run with the ball. Give constructive feedback, ask questions, hint at ideas, advocate for the team's needs.</p> <p>Abandonment. Losing good people. Stagnation, settling. Competing with other teams.</p>	<p><b>DELEGATING</b></p> <p>Hand more responsibility over to team members. Champion the team's work in the organization, get more resources for the team.</p> <p>Abandonment. Losing good people. Hubris, arrogance. Superstition. Burnout.</p>
<p><b>Team Needs</b></p> <p><b>ANALYZE</b></p> <p><b>STRATEGIZE</b></p> <p><b>ORGANIZE</b></p> <p><b>PERSONALIZE</b></p>	<p><b>MACRO</b></p> <p><b>GOALS</b> Clarify objectives, set benchmarks and define metrics. Allocate resources and training.</p> <p><b>MISSION</b> Illustrate the team's purpose. Explain how the team's work fits into big picture.</p> <p><b>STANDARDS</b> Set the standards. Define roles. Develop good procedures. Share regulations and requirements.</p> <p><b>CODE</b> Get to know each other. Create a code of conduct. Foster a sense of community. Exemplify the culture you expect.</p>	<p><b>MICRO</b></p> <p><b>MEASURE</b> Evaluate progress. Examine skills and training needed. Solve problems without criticism or judgement.</p> <p><b>INSPIRE</b> Advocate for the mission and lay out a strategy for getting there. Get buy-in.</p> <p><b>UPHOLD</b> Maintain the team's standards, hold the team accountable. Keep things on track and moving forward.</p> <p><b>MEDIATE</b> Call out behaviors but not individuals. Handle conflicts agreeably. Keep people engaged. Find motivations.</p>	<p><b>MOMENT</b></p> <p><b>SCORE</b> Acknowledge progress towards the goal. Share metrics with the team. Keep a compelling scoreboard.</p> <p><b>CELEBRATE</b> Applaud the difference the team makes. Brainstorm ways to increase team impact.</p> <p><b>PROTECT</b> Be firm about quality. Be thorough in your approach. Uphold the systems that support the team's efforts.</p> <p><b>PRAISE</b> Give and receive feedback graciously. Support each other. Socialize. Reach out to stakeholders.</p>	<p><b>MOMENTUM</b></p> <p><b>EXPAND</b> Point out team accomplishments. Reward results. Raise the bar.</p> <p><b>GROW</b> Keep the passion for the big why. Paint a bigger picture of the future.</p> <p><b>LET GO</b> Turn over more control to the team. Let them raise the standards. Plan for expansion, go for more.</p> <p><b>ADVOCATE</b> Share successes outside the team. Expand the team's support. Give back where you can.</p>



## 4 STAGES OF TEAM DEVELOPMENT

*Think about where your team is currently at, and what they need from you now.*

Which of the four stages is your team currently in? (*Forming, Storming, Norming, Performing*)

What do you see happening that needs to be addressed? (*negatives happening, positives missing*)

How should you adjust your leadership style now? (*Directing, Coaching, Facilitating, Delegating*)

What does your team need now?

Goals / Milestones / Metrics / Raise the bar	Mission / Strategy / Ideas / Bigger purpose
Standards / Systems / Execution / More ownership	Code / Trust / Support / External recognition



## NEXT-LEVEL TEAM DEVELOPMENT

*There is a fifth stage of team development. This is where the team is committed to the personal growth of the team members and to making a greater contribution in organization, community, and world.*

<p><b>TEAM PHASE</b> <i>What's going on within the team.</i></p>	<p><b>TRANSFORM</b></p> <p>The team looks beyond itself to raise up team members, other teams, the organization, stakeholders, and the community.</p>
<p><b>ROLE OF LEADER</b> <i>Where the leader should focus.</i></p> <p><i>Dangers to anticipate.</i></p>	<p><b>INSPIRING</b></p> <p>Help the team look for opportunities to have a greater impact; helping others achieve a better life through the work the team does.</p> <p>Overwhelm, burnout, loss of focus, not handling the basics.</p>
<p><b>TEAM NEEDS</b></p> <p><b>ANALYZE</b></p> <p><b>STRATEGIZE</b></p> <p><b>ORGANIZE</b></p> <p><b>PERSONALIZE</b></p>	<p><b>MISSION</b></p> <p><b>ASPIRE</b> Set goals that exist beyond the immediate. Strive for impact in the organization and community.</p> <p><b>VISION</b> Create a believable roadmap for how to have a bigger impact in the world, as well as for the members of the team.</p> <p><b>ALLOCATE</b> Decide how much time and resources are to be put into this bigger mission. Spell out the specifics of what is allowed and expected.</p> <p><b>PASSION</b> Be an advocate for the growth of the people on your team, and for the people your team is working to help.</p>

## MENTAL FITNESS & TEAM DEVELOPMENT

*Mental Fitness can be the turbo-charger to accelerating and maintaining team development.*

MENTAL FITNESS	FORM	STORM	NORM	PERFORM	TRANSFORM
<b>MENTAL FITNESS FOCUS</b>	Creating a healthy foundation. Purpose Driven Trust	Surfing the wave. Establish rules around Healthy Conflict so team can work through challenges successfully.	Develop a system of Peer Accountability so team becomes more self-monitoring, freeing up the manager for next-level priorities.	Consistently growing the teams ability to perform well internally and externally.	Continuous growth individually, as a team, and growth of those the team interacts with.
<b>RISKS WITH LOW MENTAL FITNESS</b>	Team may be playing nice, but not saying what really needs to be said.	Saboteur playground. Judging others, withholding vital information. High stress, high turnover.	Team may become complacent, or burn out from driving themselves with stress.	With low PQ, teams can burn out, or push themselves to achieve in an unhealthy and unsustainable way.	Team can become overwhelmed or distracted from key performance indicators.
<b>MENTAL FITNESS BENEFIT</b>	Settle the fears that can cause problems before the problems get out of hand.	Skill set for manager to guide team through the hardest phase. Team can embrace challenge as a gift. See the opportunity in difficulties. Carving out alignment.	High PQ teams are energized by success and don't settle for "good enough." They are hungry for more and have the capacity to pursue it.	With high PQ teams can create amazing results and sustain them with less effort and stress, freeing them to continue to grow.	Teams are energized by their self-actualization, and the transformation they are seeing in others. They realize that the core essentials of the team are what makes all of it possible.