idX™ - Collaborative Skills for Teams

Session Goal and Process

Our goal is to reconcile differences and create an engaged, collaborative team where

- People have learned to embrace their differences.

- Conflict and miscommunication are reduced.

- Meetings have a purpose and time is managed efficiently.

My personal goals for this session:

The Team Talents™ model will inform each step of today's process. We will

- **Discover** differing priorities among team members.

- **Explore** causes of miscommunication and conflict.

- **Understand** how we manage time, meetings, and projects.

- **Create** an action plan for better collaboration.

Payton Jones

Introduction to Team Talents™

It's a Jungle

Write down key words that will help you remember each area on the Team Talents™ map.

Land of Possibilities

Land of Realities

Land of Analysis

Land of Interaction

Payton Jones

3

My Team Role

Each role on a team is associated with one or more of the Team Talents™ as illustrated by this chart:

Role		Talent
Creator	◄ ►	Possibilities
Advancer	◄ ►	Interaction
Refiner	◄ ►	Analysis
Executor	◄ ►	Realities
Flexer	◄ ►	Blend of All Talents

The different team roles are summarized below. Your most natural role is indicated by the checkmark. As you read the descriptions below, imagine group members who excel in each talent.

✓ **Creator**: People who generate new ideas and fresh concepts are Creators. They prefer to live in the Land of Possibilities. Creators look for activities that are unstructured or abstract, and they thrive on innovation and unique solutions.

☐ **Advancer**: Those team members who communicate new ideas and carry them forward are Advancers. They focus on the personal world of feelings and relationships that we call the Land of Interaction. Advancers manage the human component of any solution, and they enjoy whipping up enthusiasm for a project.

☐ **Refiner**: Individuals who analyze a solution for flaws or revise a project systematically are Refiners. They focus on the objective world of facts or theories known as the Land of Analysis. Refiners use logic and a systematic approach to redesign a solution, and they make sure that ideas are sound before moving them to the next level.

☐ **Executor**: People who deliver concrete results and seek successful implementations are Executors. They prefer to live in the Land of Realities. Executors make sure that important activities get accomplished, and they pay attention to details and the bottom line.

☐ **Flexer**: Those individuals who are a combination of the other four roles are Flexers. They have an equal preference for most or all of the Team Talents. Flexers can often adapt their styles to fit the needs of the team, and they probably view issues from different perspectives.

Remember that no role is better or worse than any other. A balanced team will have all the roles and talents represented. The most effective teams have members who find the opportunities to do what they do best and give others the room to use their talents.

Payton Jones **4**

Understanding Your Team Role
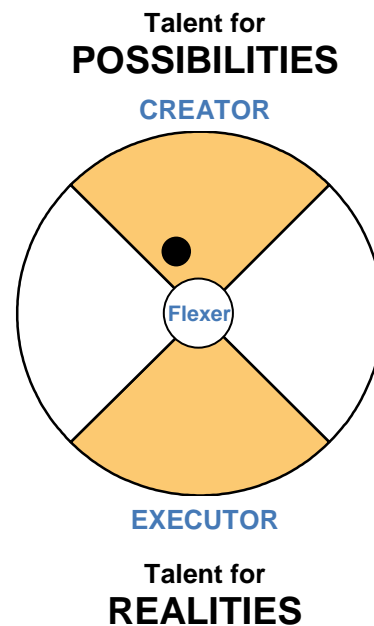
Your Team Role

Payton, you're a Creator. Read through your feedback below and personalize the description by putting a ✓ next to things that are like you, an "**X**" by things that are not like you, and a **?** mark next to things that you aren't sure about.

What makes you a Creator? Like most people, your role is based on your natural tendencies to focus your attention in certain directions rather than others. As described below, there are two dimensions that we can use to measure how people focus their attention.

One dimension measures if you prefer to focus on Possibilities or Realities. Like you, people with a talent for **Possibilities** are more likely to appreciate imaginative or abstract activities. They enjoy having far-reaching discussions, hashing out a project's potential, or creating an innovative plan. On the other hand, people with a talent for **Realities** are more likely to appreciate practical or systematic activities. They prefer tackling structured projects, performing detail-oriented work, and pursuing concrete results.

You can see that Creators have a strong talent for Possibilities and Executors have a strong talent for Realities. **Your focus is shown by the dot** on the circle to the right. You are a Creator because of your strong talent for Possibilities.

Talent for
POSSIBILITIES

CREATOR

Flexer

EXECUTOR

Talent for
REALITIES

Write down examples from your experience that demonstrate the areas you checkmarked above.

Characteristics of Team Roles

As others report about their Team Role, take notes on the characteristics of each role.

Characteristics of the Creator role:

Characteristics of the Executor role:

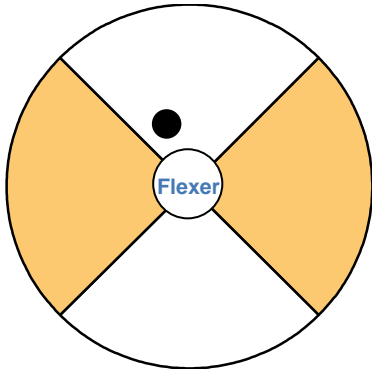**Characteristics of the Advancer role:**

Characteristics of the Refiner role:

Characteristics of Flexers:

Payton Jones **6**

Your Secondary Team Role

The Team Talents™ model allows for a deeper look at your role. Read your feedback and personalize the description by putting a ✓ next to things that are like you, an "**X**" by things that are not like you, and a **?** next to things that you aren't sure about.

Are all Creators the same? No. Another dimension helps add even more clarity to your preferred role.

This other dimension asks if you are naturally more focused on Analysis or Interaction. You have slight tendency to focus on **Analysis**, which means that you probably look at the world from a logical and questioning viewpoint. You may strive for objectivity in your work and tend to be somewhat skeptical of new ideas. On the other hand, individuals with a talent for **Interaction** are concerned with feelings and relationships. They pay close attention to personal communication and tend to be receptive to new ideas.

Looking at the figure to the left, you can see that Refiners have a strong talent for Analysis and Advancers have a strong talent for Interaction. Because of your slight focus on Analysis, you are a **Creator tending toward refinement.**

Write down examples from your experience that demonstrate the areas you checkmarked above.

Payton Jones   **7**

Working with Other Team Talents™

MODULE GOALS:

- Understand the challenges you may face when working with others who have different priorities, roles, and talents.

He Said, She Said

Take notes on the interaction between Greta and Ainsley.

Greta

What is Greta trying to achieve?

What are Greta's concerns?

Do you work with people like Greta? How would you likely react to her?

Ainsley

What is Ainsley trying to achieve?

What are Ainsley's concerns?

Do you work with people like Ainsley? How would you likely react to him?

Working with Creators and Executors

Interpersonal differences are an obvious part of life. People come to the job with different priorities, assumptions, and needs. And although these differences can complement each other beautifully, it is probably easier to see all the problems and frustrations they cause. For instance, Creators like you tend to prioritize new ideas, abstract-thinking, and creativity. You've probably recognized by now that not everyone shares these ideals. This section is designed to help you understand how to work more effectively with those around you, even when their priorities differ drastically from yours.

Read your individualized feedback about working with others, and personalize the description by putting a ✓next to things that are like you, an "**X**" by things that are not like you, and a **?** next to things that you aren't sure about.

Working with Other Creators

You most likely enjoy the hunt for new ideas and innovative methods. So you probably appreciate collaborating with individuals who embrace Possibilities, as you do. Your fellow Creators will be eager to bounce ideas around with you. Most of them will enjoy the chance to join you in colorful and challenging brainstorming. In particular, Creators who share your preference for Analysis will be especially likely to work with you to formulate original, theoretical solutions. Together, you can probably work through complex hypothetical issues that might confuse other people.

Naturally, whenever Creators are in the majority, the risk increases that endless brainstorming will stall actual implementation. Creators like to keep their options open and together they may become so energized about an idea's possibilities that deadlines become optional and schedules are forgotten. Practical concerns may take a back seat to idealistic, imaginative, and exciting ideas. Although Creators should feel free to embrace their flair for innovation at the beginning of the development process, they should be aware that they will need to rein in their creativity at some point and begin to close off some of their options.

Talent for
POSSIBILITIES
CREATOR
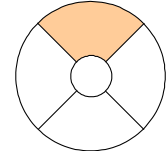
Working with Executors

In contrast to your feelings about those who emphasize Possibilities, you may believe that people with a talent for Realities are, at times, close-minded or inflexible. You probably feel tension if you think that these individuals are pressuring you to move forward too quickly. You are also likely to be frustrated if you think that your creativity is undervalued. For this reason, you probably have occasional problems with Executors, who may seem too concrete in their thinking or obsessed with immediate results rather than long-term innovation. You might also view Executors as reluctant to take risks or embrace fresh ideas, which are vital concepts to you. Further, some Executors may be so unaccustomed to discussing abstract or theoretical topics that they have trouble following highly conceptual topics. In such cases, they may simply gloss over some of your more theoretical points and wait for the discussion to turn to more concrete issues.
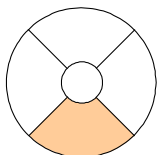
EXECUTOR
Talent for
REALITIES

You may need to recognize that your preference for unstructured activities or ambiguous ideas may rub Executors the wrong way. In particular, tension may arise if Executors feel that you are not concerned with making structured progress toward a clear result. They may feel that you devise solutions with little regard for practicality and don't follow through on grand ideas. You can allay the Executors' fears on this issue by listening to their opinions about practical concerns. Make sure that they know that you understand their reservations. Offering your best ideas in a structured, concrete way and respecting the Executors' feedback improves the odds that you will create an optimal solution.

Greta and Ainsley

Take notes on the interaction between Ainsley and Greta.

What were Greta's perceptions of Ainsley?

Why might she view him that way?

What were Ainsley's perceptions of Greta?

Why might he view her that way?

Dan and Heidi

Take notes on the interaction between Heidi and Dan.

What is Dan trying to achieve?

Dan

What are Dan's concerns?

Do you work with people like Dan? How would you likely react to him?

What is Heidi trying to achieve?

Heidi

What are Heidi's concerns?

Do you work with people like Heidi ? How would you likely react to her?

Payton Jones   **11**
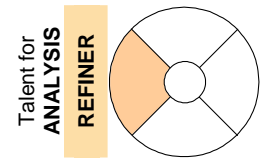
Working with Refiners and Advancers

The key to working with others is learning how to be more effective with those around you, even when their priorities differ drastically from yours. Again, read your individualized feedback about working with other. Personalize the description by putting a ✓ next to things that are like you, an "**X**" by things that are not like you, and a **?** next to things that you aren't sure about.

Working with Refiners
Your focus on Analysis can often help you to communicate well with those who appreciate logical and clear conclusions, as Refiners do. Most likely, you recognize the value of the discerning analysis that Refiners bring to the table. But because Refiners often base their opinions on objective analysis and more concrete examination, you may become annoyed if they fixate too much on hard data that limit your creativity. You may view such criticism as nit-picky obstacles to innovation and groundbreaking solutions. In turn, Refiners may become frustrated if they believe that you are more concerned with theory and imagination than with quality and precision.

The Refiner's negative feedback, however, could actually be to your advantage. Because Refiners are more questioning, they may want to see the details and develop the missing links in your more creative proposal. In this way, Refiners can improve your solution and make it stronger. Be mindful that their criticism is probably not intended to be an assault on your competence. Rather, it reflects their strong commitment to accuracy. Therefore, consider how you can encourage Refiners to help develop your ideas into their full potential.

Talent for **ANALYSIS**
REFINER
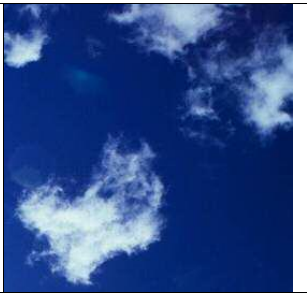
Working with Advancers
Working with Advancers means that a more personal approach may be required. Advancers prefer interaction, so they are concerned more with relationships and emotions than with theories and concepts. This means that energy and sincerity are often more powerful to Advancers than a dry recitation of a plan's benefits. The advantage of getting Advancers to support your plan is that they can communicate your ideas and get others excited about them, making your solution more powerful.

ADVANCER
Talent for **INTERACTION**
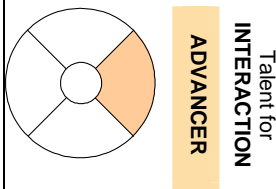
However, you may become a little frustrated if Advancers don't make their decisions in a logical manner. That is, you may feel that they rely too much on their instincts when making a decision. In turn, Advancers may experience your thought process as a little too theoretical or abstract at times. They may have difficulty joining you in complex, conceptual discussions and may appreciate more concrete, interactive brainstorming. At such points, it may be helpful to support your logical solutions with an optimistic sense of purpose.

Personal Reflection

Write down one idea or strategy to consider when working with each of the four roles.

Creators

Refiners

Advancers

Executors

Payton Jones **13**

Understanding Communication Differences

MODULE GOALS:
- Understand communication priorities and preferences of the four team roles and how they have contributed to past communication breakdowns.
- Discover specific things to consider when listening and talking to each role.

Communication Preferences

Write a few notes about when you were involved in a communication breakdown on your team.

ABOUT U

Talent for POSSIBILITIES

Creators
Creators may get most passionate and engaged in imaginative and abstract discussions. They often prefer to live in the world of concepts and may express ideas in a way that others find vague or ambiguous. Others may consider their conversational style scattered or quirky. Creators may be easily bored with discussions that are too concrete and detailed.

Refiners
Refiners are most attentive to the facts and ideas in a conversation, with less attention to the feelings expressed. They may be wary of how emotions cloud reason and may be skeptical of someone who is too enthusiastic about something. Others may feel threatened by their skepticism. They may feel that Refiners are judging their ideas.

Flexers

Advancers
Advancers often pick up on the feelings expressed in conversation. At their best, they look beyond the facts and see the real feelings behind what someone is saying. Advancers may get frustrated with those who are not as attentive to emotional needs. They may feel that their concerns are ignored or unvalued. Others may feel that Advancers are too sensitive or base their decisions on intuition rather than logic.

Executors
Executors tend to have a communication style that is practical and concrete. They are likely to discuss topics that are relevant to their personal experience and may get bored with theoretical discussions. Executors may be frustrated with those who do not express their concerns in a way that is clear and direct. Others may feel that Executors are too literal and concrete.

Talent for ANALYSIS

Talent for INTERACTION

Talent for REALITIES

Payton Jones **14**

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Breakdown Analysis

Within your group, select a communication breakdown situation that the entire group feels they can learn the most from. Answer the following questions about the situation.

What was the breakdown?

What team role or roles do you suspect contributed to the breakdown?

What sources of frustration does the Team Talents™ model suggest?

What might have been done differently?

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Communicating With All Roles

Write down one or two things to consider when listening and speaking to each role.

Creators

Listening	Speaking

Advancers

Listening	Speaking

Executors

Listening	Speaking

Refiners

Listening	Speaking

Failure to Communicate

Answer the following questions as you watch the video segment.

Ainsley

How was Ainsley's role as an Executor reflected in his communication?

Dan

How did Dan's role as an Advancer affect how he changed the message?

Heidi

How did Heidi's role as a Refiner affect the message?

Greta

How did Greta's role as a Creator affect the message?

Team Communication Action Plan

For each team role, identify the members of your real-life team who seem to prefer that role. Write down the most important things to remember when listening and speaking to each role in your real-life team.

Creators on my team include:

When communicating with these **Creators**, I need to remember to:

Refiners on my team include:

When communicating with these **Refiners**, I need to remember to:

Executors on my team include:

When communicating with these **Executors**, I need to remember to:

Advancers on my team include:

When communicating with these **Advancers**, I need to remember to:

Payton Jones **18**

Understanding Differences in Team Talents™ as a Source of Conflict

- Understand how differences in team talents can lead to conflict.
- Explore ways to resolve conflict with team members.

Conflicting Priorities

Note key words that indicate where each character puts her focus in each video segment.

Greta   **Heidi**

		Analysis vs. Interaction

		Possibilities vs. Realities

Source of Conflict

Write down your group's ideas for resolving the conflict between Greta and Heidi. Then, note the approaches presented by the other groups.

Payton Jones

Understanding How You Manage Time

A Day in the Life

Take notes about each team member's role and how they use time.

Greta

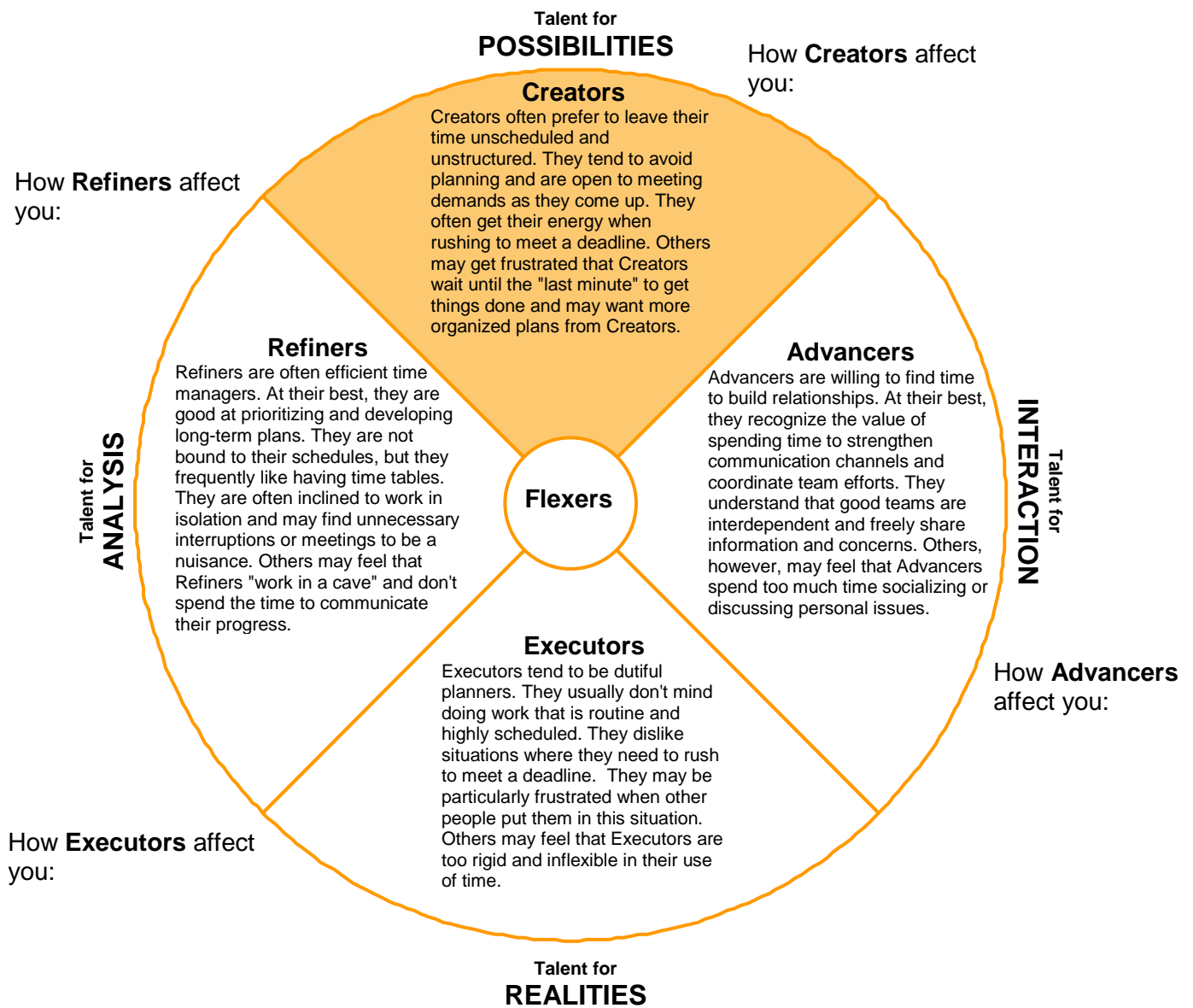Team Role: _____

Dan

Team Role: _____

Heidi

Team Role: _____

Ainsley

Team Role: _____

Time Management by Team Role

As you can see below, each of the four roles tends to have different priorities in time management. Flexers often have an ability to understand all of these perspectives, but may lean toward one or two. Your team role as a Creator is discussed in the shaded area.In your same-role groups, make a poster about your role's time-management priorities and practices using the information in the circle below and what you learned from the video.

As each group presents its poster, write notes in the margins around the circle about how each role's time-management priorities and practices affect you.

**Talent for
POSSIBILITIES**

How **Creators** affect you:

How **Refiners** affect you:

Creators
Creators often prefer to leave their time unscheduled and unstructured. They tend to avoid planning and are open to meeting demands as they come up. They often get their energy when rushing to meet a deadline. Others may get frustrated that Creators wait until the "last minute" to get things done and may want more organized plans from Creators.

Refiners
Refiners are often efficient time managers. At their best, they are good at prioritizing and developing long-term plans. They are not bound to their schedules, but they frequently like having time tables. They are often inclined to work in isolation and may find unnecessary interruptions or meetings to be a nuisance. Others may feel that Refiners "work in a cave" and don't spend the time to communicate their progress.

**Talent for
ANALYSIS**

Flexers

Advancers
Advancers are willing to find time to build relationships. At their best, they recognize the value of spending time to strengthen communication channels and coordinate team efforts. They understand that good teams are interdependent and freely share information and concerns. Others, however, may feel that Advancers spend too much time socializing or discussing personal issues.

**Talent for
INTERACTION**

How **Advancers** affect you:

Executors
Executors tend to be dutiful planners. They usually don't mind doing work that is routine and highly scheduled. They dislike situations where they need to rush to meet a deadline. They may be particularly frustrated when other people put them in this situation. Others may feel that Executors are too rigid and inflexible in their use of time.

How **Executors** affect you:

**Talent for
REALITIES**

Payton Jones **22**

Aligning Priorities in Meetings

MODULE GOALS:

- Recognize that people come to meetings with their own priorities.
- Assess how to manage your own priorities when they don't match the meeting priority.
- Understand that everyone needs to reach consensus up front about what a meeting is meant to accomplish.

Priorities During Meetings

During this activity, you will receive three priority cards.

Trade with others until you have three cards that most accurately describe your priorities during meetings.

My priority cards:

_____

_____

_____

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Chaotic Meetings

Take notes on what each character is trying to get the others to do, and circle the person whose meeting priorities seem most similar to your own.

Whose meeting priorities seem most like yours?

☐ **Greta**

☐ **Dan**

☐ **Heidi**

☐ **Ainsley**

What did Greta try to get the team to do? How effective was she? Why?

What did Dan try to get the team to do? How effective was he? Why?

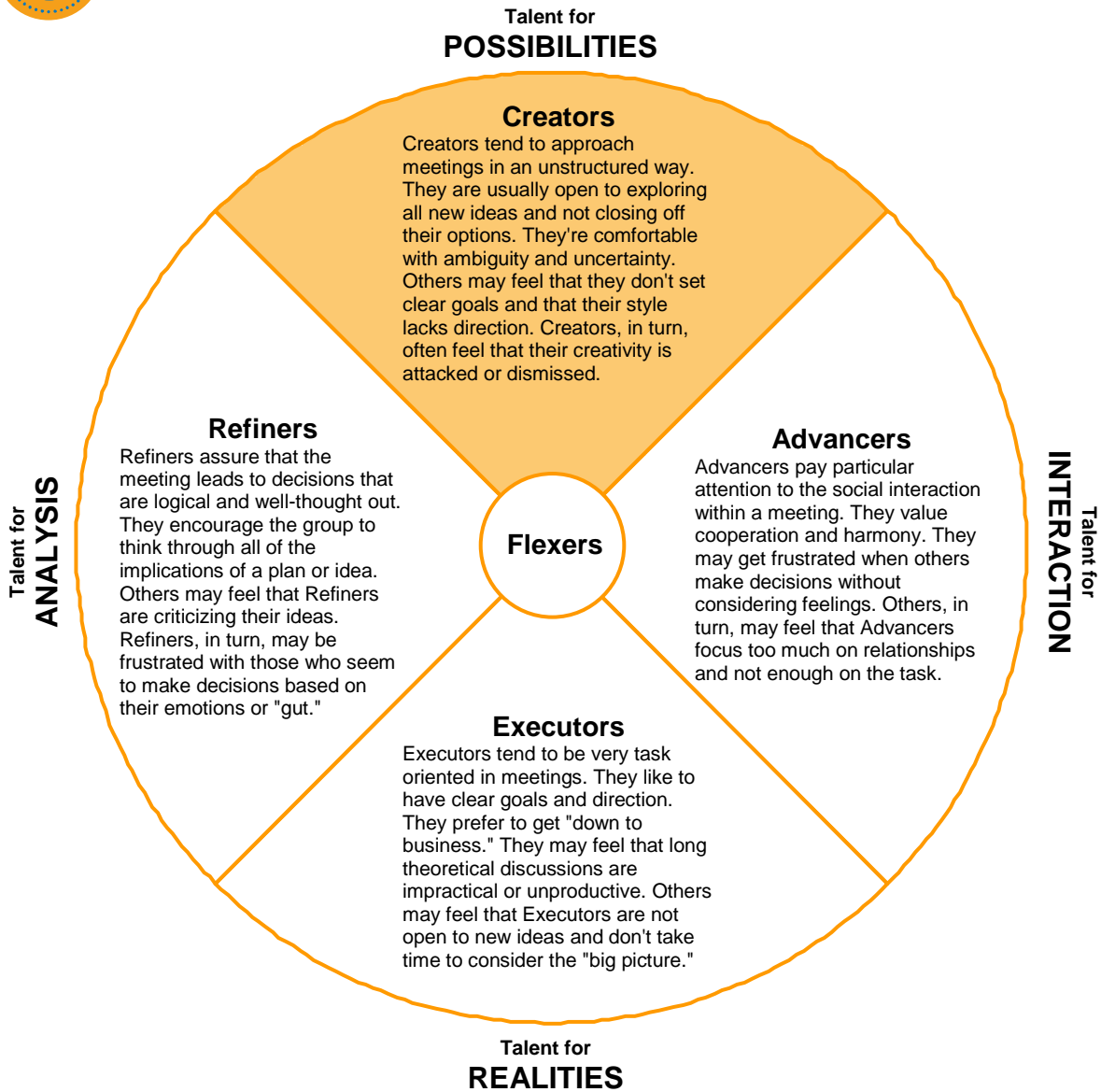What did Heidi try to get the team to do? How effective was she? Why?

What did Ainsley try to get the team to do? How effective was he? Why?

Payton Jones

Team Meeting Priorities

Group meetings can be a source of frustration if people do not value the perspective of their team members. Understanding how others approach meetings can help to reduce this tension.

As you can see below, each of the four roles has natural tendencies within a meeting. Flexers often have an ability to understand all of these perspectives, but may lean toward one or two. Your team role as a Creator is discussed in the shaded area.Read about your priority tendencies and how others interpret them when in meetings with you. Personalize the description by putting a ✔next to things that are like you, an "**X**" by things that are not like you, and a **?** next to things that you aren't sure about.

Talent for
POSSIBILITIES

Creators

Creators tend to approach meetings in an unstructured way. They are usually open to exploring all new ideas and not closing off their options. They're comfortable with ambiguity and uncertainty. Others may feel that they don't set clear goals and that their style lacks direction. Creators, in turn, often feel that their creativity is attacked or dismissed.

Refiners

Refiners assure that the meeting leads to decisions that are logical and well-thought out. They encourage the group to think through all of the implications of a plan or idea. Others may feel that Refiners are criticizing their ideas. Refiners, in turn, may be frustrated with those who seem to make decisions based on their emotions or "gut."

Flexers

Advancers

Advancers pay particular attention to the social interaction within a meeting. They value cooperation and harmony. They may get frustrated when others make decisions without considering feelings. Others, in turn, may feel that Advancers focus too much on relationships and not enough on the task.

Talent for
ANALYSIS

Talent for
INTERACTION

Executors

Executors tend to be very task oriented in meetings. They like to have clear goals and direction. They prefer to get "down to business." They may feel that long theoretical discussions are impractical or unproductive. Others may feel that Executors are not open to new ideas and don't take time to consider the "big picture."

Talent for
REALITIES

Payton Jones   **25**

Your Meeting Priorities

Reflect on your own meeting priorities and answer the questions below.

Your priority tendencies during meetings (from the previous page):

How do you let your priorities drive your actions during meetings?

How could you manage yourself better when your natural priorities are not the focus of the meeting?

Payton Jones   **26**

idX

Understanding Team Project Stages

MODULE GOALS:
- Understand the activities and priorities associated with the four stages of team projects.
- Discover how you contribute to each stage.
- Recognize the challenges you might face in stages that do not correspond to your team role.

Project Stages

Answer the following questions about your stage. Then, use that information to summarize key points that everyone should know about this stage.

My Project Stage

❑ **Creator**   ❑ **Advancer**   ❑ **Refiner**   ❑ **Executor**

What are the primary goals of this stage?

What are the activities involved in this stage?

What expectations should be agreed upon before a team begins this stage?

What are some key strategies for success in this stage?

Payton Jones   **27**

Creating Stage

Since you are a Creator, the opportunities for abstract and innovative thinking in this stage will probably be very appealing to you. The primary goal of the Creating Stage is to generate as many new ideas as possible. This means seeing things from a new angle and perhaps breaking some traditional rules. Although the team will need to evaluate the merit of new ideas toward the end of this stage, the Creating Stage should start with an open brainstorming in which no ideas are rejected as unrealistic or impossible.

POSSIBILITIES

CREATING

REFINING

ADVANCING

EXECUTING
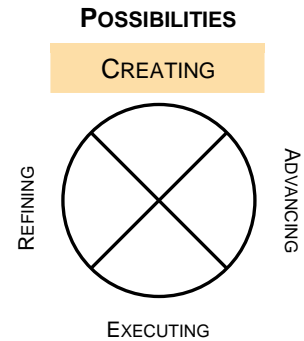
Creating Ideas

Generating fresh ideas is both an art and a science. Setting expectations can be critical in this process, because some people will naturally want to impose more structure and tradition than is ideal during this stage.

- When scheduling a meeting, call it a "Creation Meeting." This sets expectations that the structure will be loose and the goals less defined. Consequently, there will be less likelihood of frustration and confusion, particularly among those who prefer more structure.

- Consider starting with the biggest picture possible. Restate the mission of the project and ask if that mission is limited by unnecessary assumptions and traditions.

- Create a "wish list" that gives people the freedom to brainstorm about project outcomes, goals, or characteristics that might seem impractical or unrealistic on the surface.

- Don't get bogged down in details too soon. Discussing the specifics of an idea can result in a premature commitment to one direction for the project.

- Avoid the temptation to move on before all of the group's options have been explored.

Sorting Through Ideas

Toward the end of this stage, teams begin to curb their creativity and consider practical issues. Settling on the direction for the project usually means dropping some attractive, workable ideas.

- Consider the scope of the project. Are there bold ideas that can be set aside and pursued once a first phase of the project has been completed?

- Ask if the team is ready to move forward. Sometimes spending more time on brainstorming up front saves time later on. In other instances, it stagnates the group's productivity and takes a toll on morale.

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Advancing Stage

During the Advancing Stage, the team moves the idea forward and starts to give it some shape. They consider the practical issues and begin to put together a broad plan to turn this idea into reality. Communication is also key in the Advancing Stage as the team attends to the "human" part of the project. Team members need to know what's going on, what role they might play, and why it's important, and they also need to maintain energy and optimism around the idea. Consider how Advancers in the group can enhance communication and sell the merits of the project.

CREATING
REFINING
ADVANCING
INTERACTION
EXECUTING
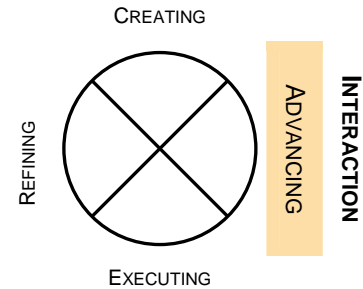
Defining the Project

After the brainstorming of the Creating Stage, the project needs some broad definition to move forward. Furthermore, the team needs to look at the big picture and determine if new ideas are realistic and worthwhile.

- Determine the simplest way to describe the idea or project. Not only does this help clarify a common vision for the project, it also helps team members quickly communicate the nature of the project to those outside the group.

- Compare the goal of the project with the overall mission of the group or organization. Are they consistent?

- Identify the different stages that the project will go through and estimate the resources that are available during each of those stages. Are they sufficient?

- Have some informal conversations with experts outside the creation group to discuss the idea in big picture terms. Is the idea realistic and useful? Has it been done before? What risks do they see?

Communication

Communication is one of the chief goals of the Advancing Stage, particularly when the team is working with a larger group. Everyone needs to understand the scope and limitations of their role. In addition, the team should be very intentional in its efforts to generate optimism and energy around the idea.

Consider the following ideas that facilitate the Advancing Stage:

- Organize an initial "Advancement Meeting" where people can ask questions and begin to feel a part of the project as soon as possible. Take time to explain the big-picture goals of the project and how it fits into the bigger mission of your group.

- Brainstorm creative ways to get all members invested in the project. Have Advancers and Creators sketch out clever and fun incentives that will help people care about the success of the plan.

- Identify all the people who will be affected by the project. Consider whose initial approval and "buy-in" will be valuable in the long-term.

- Make sure that the people who need structure, particularly Executors, have as much concrete information as possible. Create a system to communicate such things as schedules, formal role descriptions, and progress updates.

- Assign someone to be responsible for communicating changes in the plan and answering questions that arise.

Payton Jones **29**

Refining Stage

During the Refining Stage, the team evaluates the idea to see what's realistic. Team members examine project ideas for holes or flaws. They scrutinize and analyze plans to determine if they will work in the real world. In addition, during this stage the team puts together a more specific plan for implementation. Among other things, this plan considers what could go wrong, what could be more efficient, and how communication will flow. Because you tend toward Analysis, the objectivity and skepticism needed in this stage will probably come very naturally to you.

CREATING

ANALYSIS   REFINING   ADVANCING

EXECUTING
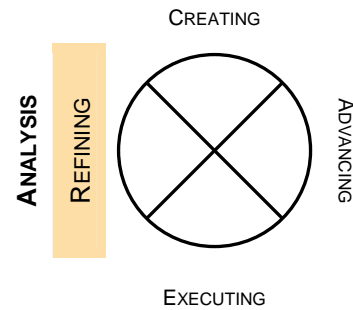
Evaluation

Evaluation occurs as part of the Refining Stage. The team looks critically at new ideas and asks "What could go wrong?" and "Will this thing work?" and "Are we really ready to move forward?" Here are some ideas to encourage the Refinement process.

- Make sure to get feedback from people who were not on the creation team. These might be members of the larger group, but it is also valuable to contact those outside the group or organization, particularly customers and clients. Consider discussing some of the specifics with experts in the field.

- Set up "Refinement Meetings" that are specifically designed to find holes in the project plan. Consider assigning people to play the role of "devil's advocate." Make sure that both Creators and Refiners are present for this meeting.

- Set up meetings to identify risks and general strategies for responding to mistakes, setbacks, or miscalculations. Remember that the scope, budget, and timeline of your project are dependent on each other. Changing one usually means revising the others.
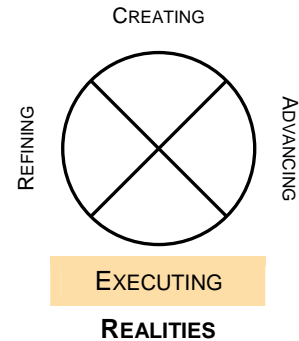
Implementation Planning

Implementation planning maps out a detailed path to turn new ideas into a reality. This involves defining tasks, assigning tasks, estimating resources, calculating budgets, and developing schedules. Here are some ideas to keep in mind:

- Take some time to separate out each project task. Specify which tasks are dependent on each other and which can take place simultaneously. In addition, determine which tasks have fixed or flexible deadlines.

- Map out the resources you have available to you. A budget should include the money, time, and opportunity cost of the project. Be specific when clarifying how much time and resources each task will take.

- When planning timelines and deadlines, it is usually advisable to put extra time into the schedule for unforeseeable obstacles. Most of us tend to be a little optimistic when estimating the amount of time that a task will take.

- Have some Creators take a look at the implementation plan and ask if there are non-traditional alternatives that haven't been considered. Could it be done faster, more efficiently, or with less stress to the team?

- Consider if pieces of the project can be handed off for execution while others are still being refined. This will ensure that resources aren't sitting idle.

Payton Jones   **30**

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Executing Stage

During the Executing Stage, the team sets its plan into full swing. This stage requires considerable dedication, organization, and scheduling. Team members need to have the patience to follow through on routine or repetitive tasks. For Executors, this is often the most fulfilling stage as it allows them to see a finished product. Other people, like many Creators, may be easily bored if routine tasks are involved. Keep in mind that Creators often find it helpful to partner with Executors, who have a knack for organization and details.

CREATING

REFINING

ADVANCING

EXECUTING

REALITIES

Beginning Implementation

Here are some systems and processes that can be set up ahead of time to ensure the plan's smooth implementation.

- Define milestones that mark the team's progress. Not only does this help keep the task on schedule, it also helps maintain momentum and energy about the work.
- Empower people, particularly Executors, to ask for clarification and direction if they need it. Appoint someone, perhaps an Advancer, to be the project "help desk."
- Create a system for quality control. Make sure your plan and timeline are flexible enough to react to the demands of the real world.

Tracking Progress

For many long and intricate projects, tracking progress is crucial. Here are some suggestions to keep this part of the Executing Stage running efficiently:

- Schedule regular meetings where team members give reports on their progress.
- Allow for last-minute refinement. Be willing to revert the project to an earlier stage for redevelopment.
- Design a process to assess changes and alternatives that arise as the project takes shape. Be open to insights that were unforeseeable earlier in the project development.
- Revisit your timelines on a regular basis. Pay particular attention to those parts of the project that have a direct impact on other sections of the plan. If resources need to be redistributed, make sure everyone on the team hears about the change and understands the reasons.

Closing the Project

Most teams look forward to finishing a project. However the project turns out, teams should consider the following to ensure success in the future:

- After the project is completed, create an archive. This invaluable step is often lost in the celebration of a finished project. However, it frequently saves much time and frustration later. This archive should contain records of decisions, communications among team members, and other important documentation.
- Recognize each person for the role he or she played. This might be a good time to pull in an Advancer to help with this communication.

Payton Jones **31**

Action Plan for Better Collaboration

MODULE GOALS:

- Create a focus for moving toward a more collaborative team.

Action Plan

Review your notes and personal reflections from each of the modules in this session. Choose an action step toward better collaboration from two of the areas.

Specific Team Collaboration Goal:

Specific Team Collaboration Goal:

What actions will you take?

What actions will you take?

What are your resources?

What are your resources?

How and when can you practice?

How and when can you practice?

Who can support or mentor you?
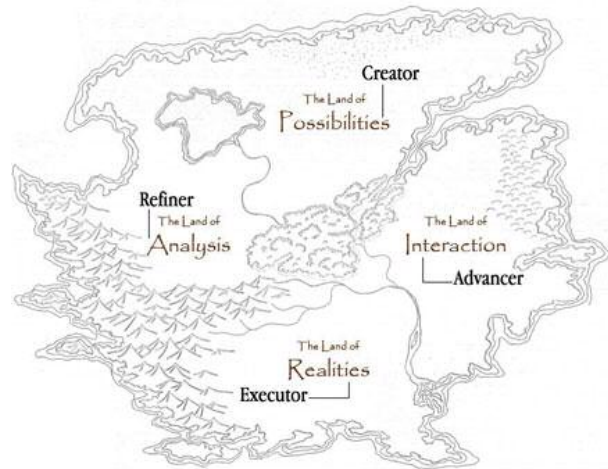
Who can support or mentor you?

Timing

Timing

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Conclusion

Review

Team Talents™ Learning Model

Talent for:		Team Role
Possibilities	◄ ►	Creator
Realities	◄ ►	Executor
Analysis	◄ ►	Refiner
Interaction	◄ ►	Advancer
Operating in All Four	◄ ►	Flexer

Differences among team members:

- Are explained by our preferences for certain Team Talents.

- Cause us to choose different roles and act on different priorities.


Miscommunication and Conflict

- Preferences in how we listen and speak can create miscommunication.

- Acting solely on our own priorities may lead to conflict.

Remember:

With an awareness of our differences, we can prevent misunderstandings and appreciate the variety that exists when we undertake team activities.

Team Project Stages

- Team projects typically flow through four stages that correspond to the Team Talent roles.

- We are all able to contribute our unique perspectives to make every stage more productive.
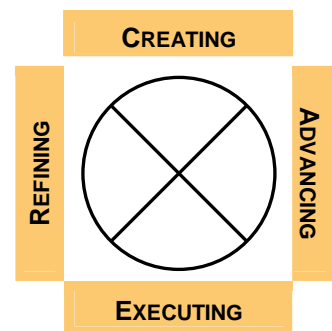
Thank you!

What I Want to Remember: