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Team Management and Meeting Facilitation

SIMPLER. FASTER. BETTER. LESS COSTLY.

Agenda

- Have a working knowledge of team building
- Review TRAIL Chart
- Conduct effective meetings
- Understand how the GRPI Model can be used to facilitate team success

Team Members

- Core Team Members
- SME's
- TRAIL Chart

TRAIL Chart

- T – Team Member
- R – Resource
- A – Approver
- I – Informed
- L - Leader

Trail Chart Template

Key Stakeholders	Project Phase				
	Scoping	Current State	Improvement Design	Implement and Action	Control and Sustain

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Trail Chart Template

Key Stakeholders	Project Phase				
	Scoping	Current State	Improvement Design	Implement and Action	Control and Sustain
Racquel	L, 20	L, 20	L, 20	L, 20	L, 10
Anna	T, 10	T, 10	T, 10	T, 10	T, 5
Michael	T, 10	T, 10	T, 10	T, 10	T, 5
Rich	T, 10	T, 10	T, 10	T, 10	T, 5
Brandi	T, 10	T, 10	T, 10	T, 10	T, 5
Steve	A, 5	A, 1	A, 1	A, 1	A, 1
Bill	I	I	I	I	I
Tom	R, 10	R, 10	R, 5	R	R
Al	R	R, 5	R, 20	R, 10	R

Hours Per Week

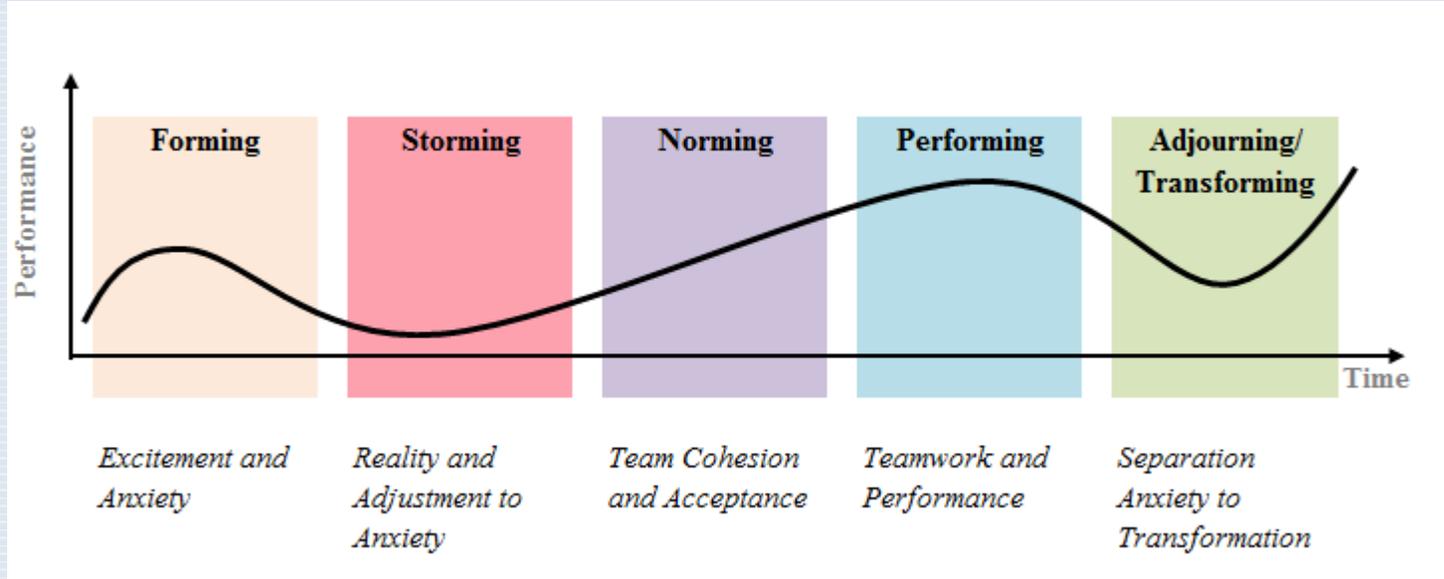
Team Members: Lessons Learned

- Follow Chain of Command
- Define Expected Time Commitment
- Functional Areas and Expertise Needed
- Customer Representation

Teamwork Obstacles

- Lack of Respect for Peers
- Incompatible Personalities
- Poor Communication
- Poor Decision-Making Skills
- Lack of Tools for Collaboration
- Lack of Clear Customer Focus
- Lack of Support and Buy-In
- Different Ways of Thinking

Team Performance



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GRPI Model

- The GRPI Model is used to facilitate team success
- Defines the four critical aspects of teamwork: **Goals, Roles, Processes, & Interpersonal Relationships**
- Use when forming a new team
- Revisit if a team starts to flounder or progresses slowly

Team Leader Role

- Manages the project and the team
- Primary contact point
- Keeps the team and project records
- Solicits help from the project champion to overcome project barriers
- Team conflict resolution

Team Management Lessons Learned

- Form Ground Rules
- Only meet if needed
- Agenda
- Distribute Pre-work before meeting
- Start on time – End on time
- Create Team Name
- Listen
- Action Registries
- Provide Minutes

Meeting Management: Agendas

TIME	TOPIC	OUTCOME	WHO AND/OR HOW
10 min	Check-in, review agenda	Ready for work!	Leader
10 min	Review pre-work	Informed	Jim-Bob
20 min	Discussion of XXX	Decision	Sam/Force-field analysis
10 min	Brain storming on YYYYY	Ideas for solution	Jane
5 min	Next Steps	Assignments	Leader/ Action register
5 min	Evaluate meeting	Improvements	Leader Plus/Delta

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Team Facilitation Guidelines

- Ask yourself “What is the desired Outcome?”
- Use the pre-work in the meeting
- Involve each participant in actions
- Create a “Parking Lot”
- Save the last 5 minutes for a meeting recap and next steps

Team Conflict Resolution

- Clarify the conflict
- Try asking: “Let’s try X...and then try something else if that doesn’t work”
- If you need to break up an argument try: “I’d suggest that...what do you think?”
- Prepare for resolution
- Acknowledge the conflict, discuss the impact, agree to cooperate and communicate, and reach a solution

Team Leader Conflict Resolution

- Stay in control
- Be direct, factual, and sincere
- Actively listen
- Assume that both sides mean well

Successful Team Tips

- Clear team goals
- Improvement plan
- Defined roles
- Communication
- Proper team behavior
- Clear decision-making procedures
- Equal participation
- Ground rules

Key Learning Points

- Have a working knowledge of team building
- Create a TRAIL Chart to help define the project team
- Understand how the GRPI Model can be used to facilitate team success

Questions?