# Team Competency Project Phase One-Designing a Work Team

## Description of the Team

### Purpose

The task was to assemble a team for a huge data center migration. We had four clients on our old system in data center A. We needed to move them all to data center B with minimum disruption and minimum risk. This project spanned six technological disciplines; systems, data storage, database, cyber security, standards compliance, and application support.

Through early planning with the team, we decided to perform a multi-phase move. This added complexity to team structure and coordination. Each of the work streams were dependent upon each other. The cyber security group had to replicate the firewall and load-balancer rules before any of the migration work could be validated in the new environment. The systems group had to follow the database group to ensure backups were complete before they initiated system shut down. The application group had to make sure ancillary data was captured and transferred during the synchronization phase. Functionality was finally at the mercy of the federal government who, working with our standards compliance group, issued or withheld our approval to operate.

Understanding the tasks and timings, I laid out the core of the project. We started with a high-level purpose. That was, to move four clients from point A to point B. Through early planning we further refined this purpose by adding success criteria. We shaped the purpose more meaningfully, with clearer direction, and more tangible measurements of success.

## Membership

Fortunately for our project, we have a pool of excellent resources to draw from. While resource availability and skillsets were top factors in the selection process, some of the requirements are beyond the control of the project manager. All personnel are required to be U.S. Citizens. People with direct access to the systems are required to have a specific level of government clearance. Following government requirements, my first criteria was technical knowledge.

I organized groups according to their technical knowledge. The systems folks were in the systems group, the data storage folks were in the data storage group, and so forth. After dividing the team into groups, I assigned a group leader to each group. The group leaders and I would be the core team. This allowed me to maintain a core team of an appropriate size to enable effective decision making.

I provided labor hour estimates for each individual to ensure understanding of their time commitment. Each team member had to understand and acknowledge their commitment to providing the estimated hours per the schedule. Each team understood that their work would be critical to the success of the other groups, underscoring the importance of commitment and communication.

Finally, I shared my vision for the project and a mission statement to keep everyone's decision-making grounded in the key tenets of the project. It was a simple list of three items. The team understood this and referred back to the three items when explaining decision making.

## Description of the Plan

### A Real Team

#### *Team Task*

We started with direction, moving four clients from point A to point B. Leadership had also given us a deadline, a single date, by which we had to be ready to shut down the old systems. Using this high-level guidance, I went about establishing a team task that spanned all six groups. I laid out several phases to show the group timings and interdependencies of the high-level tasks I expected each group to complete and when. I was not prescriptive as to how (the means), but I was absolutely clear about the dates (the ends) by which each high-level task must be completed. The team was briefed on the main task, along with the vision and mission.

#### *Bounded Team*

The team was bounded as it was assembled. When members were named, I gained their commitment to the project. Through this commitment we were able to minimize onboarding and offboarding of personnel for the entire duration of the project. To set expectations across the entire team, I built a responsibility matrix and published it publicly. This served to notify the team members and their management of the individual commitments to the project.

#### *Delimited Authority*

Delimited authority was based on the team's mission and guiding principles. The mission was, "We must move our clients from A to B quickly, with minimal impact, at the lowest possible cost." In addition to establishing the mission, I defined three guiding principles:

- Lift-and-shift (thrifty): Move clients as-is. Document our ideas for improvements or changes. Propose post-migration change orders for improvements or changes.
- Minimize downtime (least impact): Seek pre-work that won't be re-work. Be creative, explore solutions that will speed our movement.
- Teamwork: Know who's waiting on you or your outputs. Use the project plan, make updates, add details, make updates. *(note: "make updates" stated intentionally twice)* Get ahead of schedule when possible.

The team was free to make non-budgetary decisions to accomplish their individual tasks while following the three guiding principles. Our corporate guidance is clear on what we can do and what we must never do. I was able to provide guidance within our company's ethical constraints to make my expectations clear. While each group was free to make decisions, I held bi-weekly meetings with just the group leads to ensure decision making was not stalled.

### *Stability over time*

The core team, or the shell, would stay constant. "A team's shell, like that of an egg, is the shaping structure within which an organism (in the present case, a social system) comes to life." (Hackman, 129) This approach is further supported by the bounded team concept. There is a balance to be had between under-bounded and over-bounded. Where an under-bounded team loses their sense of identity and coherence and an over-bounded team risks failing to look outward due to isolation. (Hackman, 45) I would keep the core team constant, while allowing each group to draw in additional resources as needed. The core was actually comprised of several layers. The inner core was comprised of the group leads and me. The middle core was the whole

of the group membership, twenty-two in total. The outer core was the entire team, almost sixty people, who were able to ask questions and provide feedback without access to daily project operations. We maintained cohesion and efficiency by keeping this inner core team. By allowing the groups to flex around the edges, they would stay fresh while allowing for vacations and sick-leave.

## Compelling Direction

### *Energizes*

Leading by example is not the best way to lead. It's the only way to lead. I was genuinely excited about this project, the opportunity it brought to the entire team, and the positive impact we would have on our clients. I got up each day ready to make progress, ready to work through problems. I ran every call with energy and efficiency. I made sure everyone knew what was expected and why it was important. I know that my energy did transfer to others, resulting in more energized team members.

### *Engages*

Perhaps one of the most important pieces of the project was my "five reasons why" artifact. I started with a pros and cons list and then distilled it down into five reasons why everyone cared about the project. This served as the business justification to leadership, the explanation for our clients, and the guiding star for our migration team. "Five reasons why" was important in setting direction for everyone involved with and impacted by the project.

### *Ends but not Means*

I was careful to manage the balance between directive and prescriptive leadership approaches. Only when it was absolutely necessary did I prescribe the means. My focus was to be directive by stating the ends but not the means. Hackman said, "To foster self-managing goal-directed work, those who create work teams should be insistent and unapologetic about exercising their authority to specify end states, but equally insistent about not specifying the details of the means..." (Hackman, 73) Without specifics of how to get there, the groups were unburdened and able to solve problems creatively. My intent was to build a team that functioned with just the ends and without prescriptive means.

### *Modest vs. Challenging Aspirations*

I kept most of the aspirations modest to ensure we completed the project on time. By providing the “Thrifty” guiding principle, I was intentionally encouraging the team to keep aspirations modest. At the same time, I did not prevent the groups for setting challenging aspirations for themselves. We experienced troubles along the way that required us to set challenging aspirations, stretching ourselves to reach goals. The result was a conservative approach that allowed us to set challenging goals to achieve success.

### *Ways to Improve*

1. Including the group leads in setting the direction. I may have achieved more buy-in, sense of ownership from the group leads.

2. Quizzing people on the “five reasons why” and providing rewards for correct answers. I could do this at the start of a conference call. This would probably increase on-time arrival and attendance.

## Enabling Structure

### *Design of Work*

I started by conferring with individual team members to learn more about each discipline involved and the tasks required to make the project a success. I met with the people responsible for the daily delivery of services to each of the clients. This gave me insight into our actual performance, pain points, and areas where we could have an impact. I read everything I could find about each of our four clients. I read our response documents, contracts, and news articles. This provided me with knowledge of the risks to watch for throughout the execution of the project.

### *Core Norms of Conduct*

We have a strong corporate culture that sets our norms of conduct. Building upon this foundation, I set the following norms for the team.

- Keep the customer at the front of everything you do.
- Be on time to meetings. Attend all meetings. We need to be respectful of each other’s time as we are all equally valuable.
- Do what you say you are going to do. Make a commitment and stick to it. Avoid hedging language. Raise your hand early if you are going to miss a due date.

- If you identify a problem, think about a solution. Bring it to the inner core team's attention quickly so that we may consider your solution and alternatives to minimize disruption.
- No idea is a bad idea. We will prioritize our ideas. Some will be acted upon, others will be saved for a later or more appropriate time.

These norms of conduct enabled us to have creative discussions without losing focus on our project timings and deliverables. The team was aware of being part of something different where they could speak freely, be heard, and have a positive impact on our clients.

### *Composition of Team*

This project team spanned six technological disciplines; systems, data storage, data base, cyber security, standards compliance, and application support. Of these groups, systems had three resources, data storage had one, database had three, cyber security had four, standards compliance had two, and application support had ten. This adds up to twenty-two people, which is considerably larger than the ideal size of 4.6 (Hackman, 118). Once we added reviewers, consultants, interested parties, and others, the team size was up to sixty.

To maintain order, I divided the team a couple of ways. I organized six groups by technical discipline. That gave me six groups of one to four people, counting the application team of ten as an outlier. Within the groups aligned by technical discipline, I began to evaluate each individuals' skills beyond technical. Looking for leadership skills, I selected one member from each group to be the group lead. I made that person responsible for setting and monitoring the tasks for their entire group. The group leads and I were the inner core team.

I scheduled meetings to maintain focus while minimizing distraction as follows:

- We had a monthly all-hands meeting for everyone, the entire team, to hear the latest updates and project progress.
- We had a weekly all-hands meeting for all six groups, or twenty-two people to ensure the overall project was on track and to address any challenges.
- We had a weekly inner core team meeting for just the group leads and me. This was the meeting where we discussed challenges and made important decisions.
- I empowered each of the six groups to meet separately as needed and with each other to work tactical, day-to-day issues.

The inner core team stayed the same for the life of the project, as did most of the group membership. We did have some changes, but with the inner core team in place, the project was not impacted.

### *Ways to Improve*

1. More focus on the group structure. The group approach worked well. I think it can get stronger with more focus and more practice.
2. Fewer meetings. I did make some changes as the project was running. When interest waned along with attendance, I restructured the schedule and attendees accordingly.

## Supportive Context

### *Reward System*

During the project, we leveraged internal recognition to call out individual performance. We had a few stand-out folks who were recognized in front of the team and to their management. At the end of the project, I provided my leadership with a write up of individual performances and recommendations for the distribution of financial rewards for performance.

### *Information System*

While the company provides information systems, they are not fully utilized.

Using a central document repository was embraced by the team. The repository is in common use across the entire company. This was the simplest of the information systems to configure and maintain. I did attempt to use a few other systems to enable the team to manage their own project tasks but did not achieve adoption and they were eventually abandoned.

External to the project team (intra-company) communications was more difficult. We have several systems available, but no intelligence on how they've been adopted. I narrowed the communications platform down to two and provided periodic updates. External project communication was important to keep leadership and their peers advised of milestones and project successes.

### *Education System*

Our company has a large and well-established learning management system (LMS), complete with focused materials and gamification. We can learn about almost any technology we need to perform our jobs.

### *Ways to Improve*

1. Work through the information systems up front to understand what the group leads will work with. While some systems did fail, I was quick to move away from them.
2. Involve the group leads in the reward process. Allowing them to call out their team members may be empowering.
3. Figure out a way to reward the group. The group is really a "sub-team" and could be rewarded as a team.

## Expert Coaching

### *Team Coaching*

Each group within the team were experts in their disciplines. Most of the tasks required of the groups were well within range due to their level of expertise and professionalism. When challenging tasks presented themselves the groups would first attempt a resolution, while keeping the inner core team apprised. When challenges became too burdensome or were threatening our committed timings, I would first provide guidance. Only when the group could not resolve the challenge did I wade in and drive the group to resolution. When I intervened, I would make sure that the group lead was fully involved. By involving the group lead, I was teaching him or her how to resolve similar problems in the future.

### *Process Loss or Gains*

I believe that I achieved process gains through a common vision and clear tasks. The team came together and worked well. We met our deadlines. We showed amazing flexibility in our ability to creatively solve problems. I carefully monitored workloads to avoid burn-out and stepped in to help when I saw people getting overworked.

I experienced process losses due to the size of the team. Time was charged to my project for which I had no clear deliverables. Although I scrutinized the weekly charges and challenged individuals as appropriate, it was still an issue at times.

At the end of the project, I held an all-hands meeting. The theme was “what worked well” and what would be “event better if”. I encouraged open discussion but had to drag participation out of the team. I think the attendee list was too large and included too many top-level people. I didn’t get the sense that people felt free to provide candid feedback.

### *Ways to Improve*

1. Identify more clearly, the expectations and responsibilities of the group leads. Hold them accountable for adhering to their group’s estimated hours to minimize over-charging and under-charging.
2. Keep the “what worked well” and “even better if” discussions small. Start with the inner core team and work out to the groups. Maybe present the findings to all-hands and allow questions and commentary.

## Works Cited

Hackman, J. Richard. Leading Teams: Setting the Stage for Great Performances. Boston, MA: Harvard Business School, 2002. Print.