Team Building and Problem Solving

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Foundations of Teamwork

Why Teams Exist and What Makes One Actually Work

Opening Story: The Group That Wasn't a Team

Priya Nair's first Monday at Cedarview Logistics started with a desk, a login, and a stack of open customer cases. Cedarview is a regional trucking and warehousing company that moves freight across four states. Priya joined the Customer Resolutions team, five people who handle complaints about late or damaged shipments.

By her third week, she noticed something odd. Every morning, everyone logged in, opened their own queue of cases, and worked alone. Nobody talked about the work. If Priya was buried in cases and the person two desks over had nothing to do, neither of them would know it.

Twice she solved a tricky billing dispute, only to learn later that a coworker had spent a whole afternoon solving the same kind of problem from scratch. Nobody had shared what they learned.

She mentioned it to Marcus Chen, a dispatcher whose desk sat just across the aisle.

"I keep thinking we're supposed to be a team," Priya said. "But it feels like five people who happen to have the same job title."

Marcus shrugged. "Dispatch is the same way. Everybody hits their numbers. Is that a problem?"

Priya wasn't sure. Her team lead, Dana Okafor, was fair and friendly, and she mostly let people work. Priya couldn't point to anything Dana was doing wrong. Still, she remembered a summer job in college where people built on each other's work instead of just working next to each other. This felt different.

She didn't have the words for the difference yet. This chapter gives you those words.

Module 1: Why Organizations Build Teams

Every organization faces the same basic choice. Should a piece of work go to one person, or to a group of people working toward a shared result?

For much of the last century, most companies chose individuals. Each worker had a job description, a supervisor, and a narrow lane. That worked when jobs were simple and repeatable. It stopped working as products, customers, and problems got more complicated. Today, one person rarely holds all the knowledge needed to launch a new service, fix a broken process, or handle a crisis that touches five departments.

Teams became common because they solve problems that individuals can't. But teams also cost time and energy. This module covers both sides, so you can tell when a team is worth it.

What Teams Do Better

More knowledge in the room. A team pulls together people with different experience. At Cedarview, a billing clerk knows how invoices get built, a dispatcher knows how trucks get routed, and a customer resolutions specialist knows what customers complain about. Put them together and they can see a problem that none of them could see alone.

More hands for big jobs. Every person has limits on time and energy. A team can split a large job and work on several parts at once instead of one step at a time.

More and better ideas. People tend to solve problems the way they solved them last time. A second and third person bring different habits. One idea sparks another, and the final solution is often better than anything one person proposed at the start.

More commitment. When people know teammates are counting on them, most work harder and hold higher standards. Few people want to be the one who lets the group down.

Decisions people accept. A decision made by one manager behind a closed door often meets resistance, even when it's the right call. A decision made with input from the people it affects tends to stick, because they had a voice.

A Smart Team Is Not Just a Team of Smart People

In 2010, researchers led by Anita Williams Woolley published a study in the journal Science. They gave small groups a series of very different tasks, from brainstorming to planning to solving puzzles. Some groups did well across the board. Others struggled across the board.

The surprise was what predicted success. It wasn't strongly tied to the average intelligence of the members, or to having one very smart person in the group. It was more closely tied to how members treated each other. Groups did better when members were good at reading each other's reactions and when everyone got a roughly equal chance to talk. Groups where one or two people dominated the conversation did worse.

Later studies have debated how strong this effect is, and some found that individual ability matters more than the original study suggested. The fair takeaway is practical: talent matters, and so does how a team talks. A room full of capable people can still fail if only one of them is ever heard.

Where Teams Fall Short

Teams are not automatically better than individuals. In a 2015 Harvard Business Review article, Stanford professor Behnam Tabrizi described a study of 95 cross-functional teams, meaning teams made up of people from different departments, in 25 leading companies. Nearly 75 percent of those teams were dysfunctional. They failed on at least three of five basic measures: staying on budget, staying on schedule, meeting specifications, meeting customer expectations, and staying aligned with company goals.

Tabrizi pointed to causes that show up again and again: unclear goals, unclear authority, weak accountability, and organizations that don't make the team's success a priority. None of these causes are about bad people. They are about how the team was set up and run. That's good news, because setup and management are skills you can learn. That is what this book is for.

Here are the most common costs of teamwork, and how to keep each one under control.

What Teams Offer	What It Can Cost	How to Manage It
More knowledge	Time spent sharing and explaining	Keep updates short and focused on what others need to know
More ideas	Slower decisions	Agree up front on how and when decisions get made
A shared workload	Some people coast while others carry the load	Give every member a clear, visible piece of the work
Stronger commitment	Pressure to go along with the group	Invite disagreement before the team decides
Decisions people accept	More meetings	Meet when the group truly needs to talk, not just to report

When a Team Is Worth It

Not every task needs a team. If the job is routine, and one person has all the knowledge and authority needed, a team usually just adds meetings. A team is worth the effort when the work calls for at least one of three things.

Production. The team will build or deliver something concrete, like opening a new warehouse, rolling out new software, or writing a safety manual.

Ideas. The team will create options that don't exist yet, like designing a new service or finding new ways to reach customers.

Problem solving. The team will figure out why something is going wrong and fix it, like finding out why complaints are rising or why a process keeps breaking. The second half of this book is built around this kind of team.

Most teams do more than one of these. Naming the main purpose up front keeps everyone pointed at the same target.

Try This at Work

1. Pick one task on your plate right now. Ask whether it needs production, ideas, or problem solving that one person can't supply. If not, it may not need a team.

2. In your next group conversation, notice who talks and who doesn't. If one or two voices fill most of the time, ask a quieter member directly what they think.

3. Look at the table above. Choose one cost your team is paying right now and try the matching fix for two weeks.

Discussion Questions for Your Team

1. Think of a task you finished recently. Would it have gone better or worse as a team effort? What would have changed?

2. Which of the five advantages of teams matters most in your current job? Why?

3. Have you been on a team that struggled the way Tabrizi describes? Looking back, which cause was at the root of it?

Module 2: The Many Shapes of Teams

Not every group that works together is built the same way. A committee that meets once a quarter runs on different rules than a crew racing to finish a project by Friday. When people don't know which kind of team they're on, they get confused about who decides, how long the work lasts, and what success looks like.

Here are six common team shapes you will see at work.

Basic Workgroups

A workgroup is a set of people who do similar jobs side by side, mostly on their own. They share a manager, training, and maybe goals, but one person's work rarely depends on another's. Priya's Customer Resolutions team was a workgroup. Workgroups are efficient for steady, repeatable work. Trouble starts when leaders expect team-level results from a group that was never set up to work together.

Committees

A committee brings people together to discuss a topic and make recommendations, such as safety, scheduling, or budget priorities. Some committees are temporary. Others, called standing committees, meet on a regular schedule year after year. Because members often rotate, good committees keep clear notes so new members don't reopen settled questions.

Project Teams

A project has three parts: a clear goal, a budget, and an end date. A project team exists to reach that goal within those limits, then it moves on. Installing a new warehouse scanning system is a classic project. The deadline creates focus, but it can also push people to cut corners near the end. Strong project teams set checkpoints along the way.

Task Forces

A task force forms to answer one urgent question, then it disbands. You may also hear it called an ad hoc team, which means for this purpose only. Suppose Cedarview's biggest customer threatened to leave after three late deliveries in a row. A task force might form that same week to find out why. Task forces need one clear owner who can make fast decisions, because waiting for everyone to agree on every detail is too slow.

Self-Managed Teams

A self-managed team has a shared goal but no supervisor directing the daily work. The team plans its own work, checks its own quality, and holds its own members accountable. This is not less structure. It is a different structure. The team has to build its own systems for decisions, conflict, and tracking results, because no manager is doing it for them.

Quality Circles and Other Special-Purpose Teams

A quality circle is a small group of employees who do similar work and meet regularly to find and fix problems in their own processes. The idea took hold in Japanese manufacturing and spread to many American companies in the 1980s. Many of those American efforts faded within a few years.

A common reason was that companies copied the meetings but not the trust. Managers kept all the real authority, and frontline workers learned that their ideas rarely went anywhere. The lesson applies to every team shape: a team only works if the people closest to the work have real influence.

Choosing the Right Shape

Before forming any team, answer three questions. How long does this group need to exist? How much authority should it have? How urgent is the problem? Your answers will usually point to one of the shapes in this table.

Team Shape	Built For	How Long It Lasts	Watch Out For
Workgroup	Steady, repeatable individual work	Ongoing	Expecting teamwork it was never built for
Committee	Discussion and recommendations	Temporary or standing	Reopening old decisions as members change
Project team	A defined goal, budget, and end date	Until the project ends	Rushing and cutting corners near the deadline
Task force	One urgent question	Days to weeks	Slow decisions when speed matters
Self-managed team	Ongoing work without a supervisor	Ongoing	Assuming it needs no structure
Quality circle	Improving the team's own processes	Ongoing, meets regularly	Ideas that never get acted on

Try This at Work

1. Name every group you belong to at work. Label each one with a shape from the table.

2. Ask another member of each group which shape they think it is. If your answers differ, talk about it. That gap often explains confusion about who decides what.

Discussion Questions for Your Team

1. Which team shape best describes your current work group? Would everyone in the group agree?

2. Describe a time the wrong shape was used for a job, such as an urgent problem handed to a slow committee. What happened?

3. What would a quality circle need at your workplace to make sure frontline ideas actually get acted on?

Module 3: Groups Versus Teams, The Real Difference

People use the words group and team as if they mean the same thing. They don't. A group is a collection of people who share a manager, a workspace, or a job title. A team is a collection of people who share a goal and depend on each other to reach it.

The difference matters because it gives you a way to diagnose problems. When a so-called team is struggling, you can check each of the areas below and find what's missing.

Ownership

Group members own their own piece of the work and stop there. Team members own the whole result. In Customer Resolutions, each person cared about closing their own cases. Nobody felt responsible for the team's total backlog, so one person could be drowning while others sat idle.

Shared Goals

In a group, members often chase different targets. One person works for speed and closes cases fast. Another works for customer satisfaction and takes longer calls. Both goals are reasonable, but they pull in different directions. A team agrees on one shared goal, and every member can say what it is.

Rewards

People pay attention to what gets rewarded. If every review and bonus is based on individual numbers, people will focus on their own numbers, no matter what the organization chart calls them. A real team needs at least some recognition for what the team accomplishes together. Module 6 covers how to make that happen.

Trust

Trust is confidence that others will do what they say and mean well while they do it. It is built through experience, one kept promise at a time. Group members work separately, so they rarely build much trust. Team members depend on each other every day, so trust grows with every hand-off that goes right. Trust can't be announced at a kickoff meeting. It has to be earned.

Decisions and Disagreements

In a group, the manager makes most decisions and settles most arguments. On a team, members help make the decisions that shape their work, and they handle many disagreements directly. That doesn't mean every decision needs everyone's vote. It means the team has real influence, and members can disagree openly without it turning personal.

A Side-by-Side Comparison

Area	Group	Team
What it is	People who share a manager or job title	People who share a goal and depend on each other
Ownership	Each person owns their own piece	Everyone owns the whole result
Goals	Differ from person to person	One goal everyone can name
Rewards	Based on individual results	Include team results
Trust	Little chance to develop	Built through daily shared work
Decisions	Mostly made by the manager	Made with the team's input
Disagreements	Sent up to the manager	Often worked out directly

A Quick Team Check

Answer these five questions about any group you belong to. Each yes moves the group closer to being a team.

1. Can every member name the same main goal?
2. Does someone notice, and help, when one member falls behind?
3. Is any recognition based on what the group achieves together?
4. Do members trust each other to follow through without being checked on?
5. Do members help make decisions and settle most disagreements themselves?

Most workplace groups land somewhere in the middle. That's normal. The point is to find the one or two areas that would make the biggest difference and work on those first.

Try This at Work

1. Run the quick team check with your team, not by yourself. Have each person answer on their own first, then compare.

2. Find the question with the most no answers. Agree on one small change to try in that area over the next month.

Discussion Questions for Your Team

1. Using the comparison table, where does your current work group look more like a group, and where does it look more like a team?

2. Think of a disagreement you had with a coworker on shared work. Did you settle it yourselves, or did a manager step in? What does that tell you?

3. What would need to change in your workplace's rewards for people to care about the team's result, not just their own?

Module 4: Building the Foundation for Team Success

Putting talented people in the same room does not make a team. Teams that succeed tend to do the same handful of things early, and teams that struggle tend to skip them. This module covers five foundation practices and the resources every team needs.

Practice One: Set Goals Together

Leaders can and should say what result the organization needs. But the team should help decide how to get there. When a manager hands over a finished plan and expects instant buy-in, people treat the work as someone else's plan. Give the team room to shape the path, the milestones, and how progress will be measured.

A good team goal is specific, measurable, and has a deadline. "Improve customer service" is a wish. "Cut the average time to resolve a damage claim from nine days to five by June" is a goal. Every member should be able to repeat it.

Practice Two: Clarify Roles Before Work Begins

Every team needs certain jobs done, whether anyone assigns them or not. Someone keeps the group focused. Someone takes notes and tracks tasks. Someone smooths over friction. Someone brings the technical know-how.

Problems come from two directions. Sometimes a needed job goes unclaimed, and important work like tracking decisions never happens because nobody thought it was theirs. Other times, one person tries to do everything and burns out while others check out. Make the roles visible early. Chapter 2 covers team roles in more depth.

Practice Three: Balance the Work and the People

Good team leaders keep two things in view at once: the work that needs to get done, and how the people doing it are holding up. A leader who only watches deadlines can hit this month's target and wear the team out for the next one. A leader who only watches morale can keep everyone happy and still miss the target.

The best leader is not always the person with the highest title. Sometimes the right move is to start with someone who keeps the team organized, then let a natural leader emerge as members earn each other's trust.

Practice Four: Hear Every Voice

A team's mix of backgrounds and viewpoints is one of its biggest assets, but only if the team uses it. Many teams fall into a pattern where familiar ideas get approved and unfamiliar ones get politely ignored, especially when they come from newer or quieter members.

Set a simple ground rule: every idea gets a real hearing before the team decides. That doesn't mean every idea wins. It means no idea loses just because of who said it.

Practice Five: Use Urgency Wisely

Teams tend to focus better when the work feels urgent, such as a real deadline or a customer waiting on an answer. Urgency cuts through busywork. But urgency is a short-term fuel. A team that lives in constant crisis mode burns out. Use urgency for a defined push, then let the pressure ease.

What Every Team Needs to Do Its Job

Even a well-organized team will stall without the right resources. Before the work starts, check that the team has these five things.

Time. Members need real hours for team work, not just whatever is left over after their regular job.

Information. The team needs access to the data, records, and people that hold the answers.

Tools. This includes software, a place to meet, and whatever equipment the work requires.

Skills. If the team lacks a skill it needs, it has to get training or add a member who has that skill.

Support. Someone with authority has to back the team, clear roadblocks, and act on its results.

The Five Practices at a Glance

Practice	What Success Looks Like	Common Failure
Set goals together	The team shapes how the result gets reached	A plan handed down with no discussion

Practice	What Success Looks Like	Common Failure
Clarify roles	Every needed job has an owner	A job goes unclaimed, or one person does everything
Balance work and people	Targets met without wearing people out	All deadlines, or all morale
Hear every voice	Every idea gets a real hearing	Familiar ideas win by default
Use urgency wisely	Urgency drives a focused push	Constant crisis burns the team out

Try This at Work

1. Ask each team member to write down the team's main goal without looking at any notes. Compare answers. If they don't match, you've found your first task.

2. List the jobs your team needs done, such as tracking tasks or taking notes. Put a name next to each one.

3. Check the five resources. Which one is your team shortest on? Who could help you get more of it?

Discussion Questions for Your Team

1. Which of the five practices is your team handling well? Which one is missing?

2. Has an important job ever fallen through the cracks on your team because nobody owned it? What happened?

3. Describe a time urgency helped your team and a time it wore your team down. What was different?

Module 5: Empowering Teams to Act

A team can have a great plan, the right people, and strong commitment, and still get almost nothing done if it needs permission for every step. Empowerment means giving a team real authority to decide and act within clear limits.

Why Empowerment Is Hard

Traditional organizations are built around a few people making decisions while everyone else carries them out. Handing authority to a team changes that. Some managers feel it as a loss of control, even when they support the idea. Some team members aren't used to owning decisions and would rather wait to be told.

Neither side is being unreasonable. Trust in a team's judgment is built the same way as trust between people: through a track record. Authority usually grows in steps as the team proves it can handle it.

Levels of Team Authority

It helps to name exactly how much authority a team has on a given decision. Confusion here causes a lot of frustration. A team thinks it can act, then gets overruled, or it waits for an approval nobody thought was needed.

Most teams work at different levels for different decisions. The goal is not to reach Level 4 on everything. The goal is to make sure everyone knows which level applies before the decision comes up.

Level	What the Team Can Do	Example at Cedarview
Level 1: Inform	Gather facts and report them	Pull data on how many damage claims came in last quarter
Level 2: Recommend	Propose a solution for someone else to approve	Suggest a new claims process for the operations manager to approve
Level 3: Act and Report	Make the decision, then tell leadership what was done	Change the order in which claims are handled, then report the results
Level 4: Act Independently	Decide and act within agreed limits without reporting each decision	Approve customer refunds up to an agreed dollar limit

Five Steps to Earning Real Authority

Clarify the mission first. Before the team starts, get clear answers. Is the team supposed to find problems, propose solutions, carry them out, or all three? How long will the team exist? How much time should members give it?

Get visible backing. A team needs support from someone who controls resources. When a leader says out loud that the team has their backing, other departments cooperate more readily.

Keep leaders informed without burying them. Send short, regular updates. A manager who feels in the loop is far more willing to let go of control.

Bring solutions, not just problems. When the team hits a roadblock, raise it early and bring at least one possible fix. It shows good judgment and builds trust.

Ask for authority before you need it. Waiting until the last minute to ask for approval makes the request feel rushed and risky. Ask ahead of time for standing permission on routine decisions.

Back at Cedarview

A few months after Priya joined, customers began complaining that refunds for damaged freight took too long. Every refund, even a small one, needed a signature from the regional operations manager. The requests piled up on his desk while customers waited and called back, angrier each time.

Dana brought him a proposal instead of a complaint. The team would approve refunds under a set dollar limit on its own, log every one, and send him a short weekly summary. Anything above the limit would still go to him. He agreed to try it for one month.

Refunds that used to take a week started going out in a day. The weekly summaries showed no mistakes. At the end of the month, he made the arrangement permanent. The team had moved from Level 2 to Level 4 on small refunds, and it got there by earning it.

Try This at Work

1. List three decisions your team makes often. Write down the authority level for each one.
2. Share the list with your manager. Ask whether they see the levels the same way.
3. Pick one routine decision and propose standing authority for it, with a clear limit and a simple way to report results.

Discussion Questions for Your Team

1. Which decisions does your team need approval for that slow down your work?
2. Describe a time you brought a manager a problem with a solution already in hand. How did it go compared to bringing only the problem?
3. What track record would your team need to earn more authority on one type of decision?

Module 6: Recognizing and Rewarding Team Effort

Most people get frustrated when hard work goes unnoticed. On teams, this happens a lot, because shared work is harder to see than individual work. When a team solves a big problem, it can be hard to tell who did what, so sometimes nobody gets credit at all.

When Rewards Don't Match the Work

Many companies say they value teamwork but review and pay people only on individual results. That sends a mixed message. If the only numbers on a review are personal numbers, people will protect their personal numbers, even at the team's expense.

A team leader usually can't rewrite the company's pay plan. But a leader can make the team's work visible and make sure individual reviews reflect what each person contributed to the team.

Five Ways to Earn Recognition for Your Team

Make the team's work visible. Share specific results with leadership and other departments. "We cut claim processing time from nine days to five" gets noticed. "We've been working hard" does not.

Learn how reviews actually work. Find out what your company's review process measures and who has input. Then make sure team contributions show up in terms that process recognizes.

Aim to beat the goal, not just meet it. Results that go beyond expectations are far more likely to get attention and reward.

Learn what motivates each person. Some people value public praise. Others would rather have a quiet thank-you, a new challenge, or more flexibility. Ask. Don't guess.

Say thank you, specifically. Appreciation is one of the most powerful and least expensive tools a team has. The more specific it is, the more it means.

How to Give Specific Appreciation

Vague praise like “great job” fades fast. Specific appreciation sticks, and it shows people exactly what to keep doing. Use a simple three-part pattern.

1. Say what the person did. “You rebuilt the claims checklist over the weekend.”
2. Say what it made possible. “Because of it, the whole team cleared the backlog by Tuesday.”
3. Say thank you. “Thank you. That made a real difference.”

It takes less than a minute, and people often remember it for months.

Recognition Done Well and Done Poorly

Practice	Done Well	Done Poorly
Sharing results	Specific results shared with the right people	Vague claims of hard work
Using the review process	Team contributions written into individual reviews	Team work left out of reviews entirely
Motivating people	Rewards matched to what each person values	One reward for everyone
Saying thank you	Specific, timely, and sincere	Generic, late, or only at year end

Try This at Work

1. Before the end of this week, give one teammate specific appreciation using the three-part pattern.

2. Ask each person on your team one question: “When you do great work, what kind of recognition means the most to you?” Write down the answers and use them.

Discussion Questions for Your Team

1. Does your company’s review process recognize team results, individual results, or both? How can you tell?

2. Think of a teammate whose motivation you might be misjudging. What could you ask to find out?

3. When did someone last thank you in a specific way? How did it affect your work?

Chapter Summary

Priya never got an announcement that her group had become a team. The change was smaller and slower. Dana started opening the weekly check-in by asking what people were stuck on, not just what they had finished. Priya shared her notes on billing disputes, and two coworkers added their own. The new refund authority gave the team something to own together. It wasn’t a transformation. It was a start.

Here are the most important ideas from this chapter to carry forward:

1. A team is not just people who share a manager or a job title. A real team shares a goal, and its members depend on each other to reach it.

2. Teams bring more knowledge, more ideas, and more commitment than one person can, but they also cost time and energy. Use a team when the work truly calls for one.

3. Many teams underperform, usually because of unclear goals, unclear authority, and weak accountability, not bad people. All of these are fixable.

4. Strong teams build their foundation early: shared goals, clear roles, balanced leadership, every voice heard, and the time, information, tools, skills, and support to do the job.

5. Teams need real authority at a clearly named level, and recognition that makes shared work visible. Both are earned through a track record.

Forming a Strong Team

High Performance, Group Development, Roles, and Rules

Opening Story: Four People, One Deadline, No Idea How to Start

A few months after the refund change, Dana called Priya into her office with a new assignment. Cedarview's tracking system had been showing the wrong delivery windows for refrigerated shipments. Customers were planning around delivery times that turned out to be wrong, and a few had already lost perishable stock. Leadership wanted it fixed within six weeks.

The team looked great on paper. Priya came from Customer Resolutions, because she heard the complaints firsthand. Marcus came from Dispatch, because he understood routing. Owen, a route planner, joined from the Green Bay warehouse. Farah, a data analyst, joined from Cedarview's Minneapolis office and worked entirely remotely. Dana would check in every week, but she didn't name a leader. "You four will figure it out," she said.

The first meeting was polite and useless. Everyone introduced themselves. Everyone nodded along to a vague summary of the problem. Nobody asked a hard question, and nobody admitted they weren't sure what a finished fix would even look like.

The second meeting was worse, but at least it was honest. Owen challenged an assumption Marcus had made about how routing data reached the tracking system, and it came out sharper than he meant. Marcus got defensive. Farah, dialing in from two states away, barely spoke. Priya couldn't tell whether Farah disagreed or just couldn't find a way into a conversation happening around a table she wasn't sitting at.

By the end of week two, the team had held four meetings and produced nothing but a shared feeling that this was going to be harder than anyone expected. Priya almost missed her old workgroup. At least it had been predictable.

Module 7: What Separates High-Performing Teams

Some teams deliver far more than you would predict from the people on them. Others, full of talented people, never get going. The difference is not luck, and what researchers have found is practical enough to use on Monday morning.

What Google Found When It Studied Its Own Teams

Google set out to learn why some of its teams thrived while others struggled. Its researchers studied 180 teams inside the company, in a project it called Project Aristotle. They expected to find that the best teams had the best mix of people, such as the right blend of skills, personalities, or experience. That is not what they found. Who was on a team mattered less than how the team worked together.

The researchers named five things that set the strongest teams apart.

Psychological safety. Members feel safe to speak up, ask questions, and admit mistakes without being embarrassed or punished.

Dependability. Members can count on each other to do quality work on time.

Structure and clarity. Everyone knows the goals, their own role, and the plan.

Meaning. The work matters to each member personally.

Impact. Members believe the team's work makes a real difference.

Google found that psychological safety was by far the most important of the five. Without it, the other four are hard to build. If people won't admit they're behind, dependability suffers. If they won't ask basic questions, clarity suffers.

What Psychological Safety Means

The term comes from Harvard professor Amy Edmondson. She describes it as a shared belief on a team that it is safe to take interpersonal risks. In plain terms, you can say "I don't understand," "I made a mistake," or "I think we're wrong" without paying a social price for it.

Edmondson came to the idea through a hospital study in the 1990s. She expected the best nursing teams to report the fewest medication errors. Instead, they reported more. The better teams weren't making more mistakes. They were more willing to talk about them, so they caught and fixed problems that other teams kept hidden.

That finding holds a lesson for every workplace. A team that never reports problems may not have fewer problems. It may just have more silence.

Safety Is Not the Same as Being Nice

Psychological safety does not mean everyone agrees, avoids hard conversations, or lowers the bar. The strongest teams pair safety with high standards. Safety without standards feels comfortable but gets little done. Standards without safety make people anxious, and anxious people hide mistakes. Put the two together and you get a team that aims high and learns fast.

How Leaders Build Safety

Go first. When a leader admits a mistake or says "I'm not sure," everyone else learns that it's allowed.

Respond well to bad news. The first time someone brings a problem forward, the reaction they get teaches the whole team whether it's safe to do it again.

Ask real questions. Questions that invite honest answers show that the leader actually wants input.

Treat mistakes as information. Ask what a mistake reveals about the process, not who should be blamed for it.

Small changes in wording make a big difference. Here are a few swaps worth practicing.

Instead of This	Try This
“Who messed this up?”	“What happened, and what can we learn from it?”
“That won’t work.”	“What would have to be true for that to work?”
“Any questions? No? Good.”	“What questions do you have?”
“Why didn’t you tell me sooner?”	“Thanks for raising this. What do you need?”
“Let’s move on.”	“Before we move on, what are we missing?”

Try This at Work

1. At your next meeting, ask “What are we missing?” and then wait a full ten seconds before anyone moves on.
2. Share one small mistake you made this week and what you learned from it.
3. Pick one phrase from the table and use it at least twice this week.

Discussion Questions for Your Team

1. On your current team, how safe is it to say “I made a mistake”? What makes you think so?
2. Of Google’s five dynamics, which is strongest on your team, and which is weakest?
3. Think of a time someone reacted badly to bad news. What did that teach the people who saw it?

Module 8: Mapping the Stages of Group Development

A new team doesn’t start out as a team. It grows into one, and that growth tends to follow a pattern. In 1965, psychologist Bruce Tuckman described four stages that groups move through: forming, storming, norming, and performing. In 1977, he and Mary Ann Jensen added a fifth stage, adjourning, for when a team’s work comes to an end.

Knowing the stages won’t make your team’s growth painless. It will help you recognize what is happening and respond to it instead of panicking.

Forming: Polite and Unsure

In the forming stage, members are polite and a little guarded. They are figuring out the goal, the other people, and where they fit. Meetings feel smooth, but not much real work happens, because nobody wants to rock the boat yet.

What the team needs is direction: a clear purpose, clear goals, and time to get to know each other. Skipping this stage to jump straight into tasks usually backfires later.

Storming: Friction Shows Up

As the work gets real, differences surface. People push for their own ideas, question the plan, and test who has influence. Tension rises. Some members go quiet. Others push harder.

Storming feels like failure, but it is normal. A team that never storms is often just avoiding hard topics. What the team needs now is a way to disagree without it turning personal: ground rules, a fair process for decisions, and a leader who names the conflict instead of ignoring it. Teams that skip this work can stay stuck in storming for a long time.

Norming: Agreement Takes Hold

When a team works through its early friction, it starts to settle. Members agree on how they will work together, either formally or through habit. These shared expectations are called norms. Trust grows, and people begin to feel like part of something.

The leader can now step back a little and hand over more responsibility. The risk in this stage is getting so comfortable that people stop challenging each other.

Performing: The Team Hits Its Stride

A performing team works smoothly and needs little supervision. Members know their roles, trust each other, and settle disagreements quickly. This is where most of a team's best work happens. The leader's job shifts from directing the work to removing obstacles and keeping the team pointed at the goal.

Adjourning: Ending Well

When the work is done, the team wraps up. Good teams finish the last tasks, look back at what they learned, share those lessons with others, and recognize what each member contributed. People are often sad to see a good team end. That is a sign the team created something real.

The Stages at a Glance

Stage	What You'll See	What the Team Needs
Forming	Politeness, uncertainty, and lots of questions	A clear purpose and time to get acquainted
Storming	Friction, pushback, and testing of influence	Ground rules and a fair way to disagree
Norming	Shared habits and growing trust	More responsibility and a push to keep challenging ideas
Performing	Smooth work with little supervision	Obstacles removed and a steady focus on the goal
Adjourning	Wrapping up and looking back	Time to reflect, share lessons, and recognize contributions

Teams Can Slide Backward

The stages are not a one-way street. A new member, a new leader, a change in goals, or a crisis can send a performing team back into storming. That is normal too. When it happens, go back to what worked the first time: clarify the goal, revisit the ground rules, and give people room to adjust.

The model is most useful for diagnosis. When your team struggles, ask which stage it is in before deciding something is broken. A team in the middle of storming doesn't need to be replaced. It needs help getting through the storm.

Try This at Work

1. Ask each team member to name the stage they think the team is in. Talk through any differences.

2. Find your stage in the table. Pick one thing from the What the Team Needs column and provide it this month.

Discussion Questions for Your Team

1. Which stage best describes your team right now? What evidence points to it?

2. Has your team ever gotten stuck in storming? What helped it move on, or what is still unresolved?

3. Think of a team that slid backward after a change. What brought it back?

Module 9: Choosing Team Members and Team Size

Sometimes a leader gets to choose the team. Sometimes the team is handed over, fully formed. Either way, it helps to know what a well-built team looks like, so you can spot the gaps and fill them.

Start With the Work, Not the People

The most common mistake in building a team is starting with people you know and like, then looking for jobs they could do. Reverse the order. First ask what the work requires. Then find the people who bring it. Most teams need a mix of four things.

Technical skills. The know-how the work demands, such as data analysis, equipment knowledge, or budgeting.

Problem-solving skills. The ability to figure out what is wrong and weigh the options for fixing it.

People skills. Listening, giving feedback, and working through disagreement.

Inside knowledge. Knowing how things really work at the organization, who to call, and what has been tried before. This rarely shows up on a résumé, but it can save a team weeks.

Weigh Attitude Along With Skill

Skill matters, but so does attitude. A person with strong skills who resists the team's goals can drag down everyone around them. A person with solid skills and a good attitude is often worth more than a star who won't cooperate.

Skills and Attitude	What to Expect
Strong skills, positive attitude	Your strongest choice
Weaker skills, positive attitude	A good choice if you can provide training

Skills and Attitude	What to Expect
Strong skills, negative attitude	Risky, since one person can drain the whole team
Weaker skills, negative attitude	Avoid if you have any choice

Why a Team of Stars Can Fail

It is tempting to build a team from the most talented people available. But a team of stars can struggle if everyone wants to lead, nobody wants to handle the details, and members compete instead of cooperating. What matters is how the skills fit together. A good team is like a good toolbox. You need different tools, not five of the same hammer.

Bigger Isn't Better

When a team struggles, the first instinct is often to add people. That rarely helps as much as expected. Every new person adds relationships to manage, updates to share, and chances for confusion.

You can see this with simple math. Every pair of people on a team is a link that needs communication, and links grow much faster than headcount. Going from five people to eight nearly triples the number of links. Going to twelve multiplies it more than six times.

Team Size	Communication Links
3 people	3 links
5 people	10 links
8 people	28 links
12 people	66 links

People Pull Less in a Crowd

There is a second problem with big teams. In the 1880s, a French agricultural engineer named Max Ringelmann found that as more people worked together on a pulling task, each person's average effort went down. For years, people assumed the cause was poor coordination. In 1974, Alan Ingham and his colleagues tested that idea. They had people pull on a rope while believing teammates were pulling with them. The teammates were only pretending. Even with no coordination problem at all, people still pulled less when they thought others were helping.

Researchers later named this social loafing: people tend to ease off when their own effort is hard to see. It usually isn't laziness. It is a natural sense that someone else will cover it.

You can reduce social loafing by keeping teams small, giving each person a distinct and visible piece of the work, and making sure everyone can see how their piece affects the result.

How Big Should Your Team Be?

There is no perfect number, and size isn't everything. When Google studied its teams, how members worked together mattered more than how many there were. Still, a useful rule is to make the team as small as possible and as large as necessary. If you need input from many people, invite some of them as advisors instead of full members.

Back at Cedarview

After two rough weeks, Dana offered to add three more people to the refrigerated shipments team. Priya did the math. Four people meant six links. Seven people would mean twenty-one.

“We don’t need more people,” she told Dana. “We need someone who can answer our questions about the tracking software when we get stuck.” Dana arranged for an IT specialist to sit in on the team’s meetings every other week as an advisor. The team stayed at four, and the questions that had been stalling them started getting answered.

Try This at Work

1. Count the people on your team and the links between them. Is every member necessary?
2. List the skills your team’s work requires, and put a name next to each one. Any skill without a name is a gap to fill, possibly with an advisor.

Discussion Questions for Your Team

1. Have you been on a team that was too big? What were the signs?
2. Think of a time you eased off because others were working on the same task. What would have kept you fully engaged?
3. What inside knowledge do you bring that doesn’t show up on your résumé?

Module 10: Defining Team Roles

Every team member plays a role, whether anyone assigns it or not. Some roles are formal jobs, like leader or note-taker. Others are natural patterns in how people contribute, like the person who always spots the flaw in a plan. Strong teams pay attention to both.

Formal Roles

Formal roles are assigned jobs that keep the team running. Most teams need at least these four.

Leader. Keeps the team focused on the goal, makes sure work gets assigned, and connects the team to the rest of the organization.

Facilitator. Runs discussions so everyone is heard and the group stays on track. On small teams, the leader often does this job too.

Recorder. Captures decisions, action items, and deadlines, and shares them after each meeting.

Timekeeper. Watches the clock so meetings start and end on time and big topics get enough attention.

These jobs can rotate. What matters is that each one has an owner. Chapter 7 adds the roles used on improvement projects, such as the sponsor and the coach.

Natural Roles

In the 1970s, British researcher Meredith Belbin studied management teams to learn why some succeeded and others failed. He found that the best teams had a balance of natural roles. His model eventually settled on nine, grouped into three families: thinking roles, people

roles, and action roles. He also found that each role's strength comes with a matching weakness, a normal cost of what that person does well.

Family	Role	What They Bring	Watch Out For
Thinking	Plant	Original ideas and fresh approaches to hard problems	Can overlook practical details
Thinking	Monitor Evaluator	Careful, logical judgment of the options	Can seem critical or slow to get excited
Thinking	Specialist	Deep knowledge in one area	Can get lost in technical details
People	Coordinator	Clarifies goals and brings out the best in others	Can hand off too much of their own work
People	Teamworker	Listens, supports, and eases friction	Can avoid hard decisions and confrontation
People	Resource Investigator	Finds outside contacts, ideas, and opportunities	Can lose interest once the excitement fades
Action	Shaper	Drive and energy to push past obstacles	Can come across as blunt or pushy
Action	Implementer	Turns plans into organized, practical action	Can resist new ideas or changes
Action	Completer Finisher	Catches errors and makes sure work is truly done	Can worry too much and struggle to delegate

A Quick Role Self-Check

Read the statements below. Pick the two or three that sound most like you when you work on a team.

1. Plant: I'm often the one with a new idea when the team is stuck.
2. Monitor Evaluator: I like to weigh the pros and cons before the team commits.
3. Specialist: People come to me for expert knowledge in one area.
4. Coordinator: I help the group clarify its goals and make sure everyone has a part.
5. Teamworker: I notice when someone is upset and help smooth things over.
6. Resource Investigator: I know people outside the team who can help, and I like reaching out to them.
7. Shaper: I push the team to keep moving when things get hard.
8. Implementer: I turn ideas into a practical plan with steps and deadlines.
9. Completer Finisher: I catch the mistakes and loose ends that others miss.

Most people have two or three natural roles, and their roles can shift from one team to another. This quick check is a conversation starter, not a formal test. Belbin's own assessment, which also gathers input from coworkers, gives a fuller picture.

When a Role Is Missing

Once your team knows its natural roles, look for gaps. A team full of Plants and Shapers will generate energy and ideas but may never finish anything. A team of Implementers and Completer Finishers will execute well but may miss better approaches. You don't need nine people to cover nine roles. You need someone to consciously pick up a missing role when the work calls for it.

Back at Cedarview

In week three, Priya asked everyone to do the role self-check. Owen was a clear Shaper, which explained why his pushback came out so sharp. Farah was a Monitor Evaluator. She had been quiet in meetings because she was still weighing the options, not because she disagreed. Marcus was an Implementer, and Priya landed on Coordinator and Teamworker.

Nobody was a Completer Finisher. That explained why two tasks had quietly slipped. Marcus agreed to own a final checklist before anything went live. Farah agreed to share her analysis in writing before each meeting, so her thinking wouldn't get lost in fast conversation.

Try This at Work

1. Take the quick role self-check. Then ask a coworker which roles they see in you, and compare.
2. Map your team's natural roles. Name one missing role and decide who will cover it.
3. Make sure every formal role on your team has a named owner.

Discussion Questions for Your Team

1. Which natural roles describe you best? Do you agree with how others see you?
2. Think of a time a role's weakness caused friction on your team. How could naming it have helped?
3. Which role is missing from your team right now, and what problems has that gap caused?

Module 11: Setting Team Rules and Clear Objectives

Every team develops rules, whether anyone writes them down or not. If people show up late and nobody says anything, the rule becomes "being late is fine." If one person interrupts and nobody objects, interrupting becomes normal. Unwritten rules form fast, and they are hard to change later.

The fix is to set the rules on purpose, early, and together. These shared rules are often called ground rules or team norms. Most teams should cover four areas.

Four Areas Every Team Should Cover

Area	What It Covers	Example Rule
Respect	How members treat each other	Challenge ideas, not people

Area	What It Covers	Example Rule
Communication	How discussion happens	One conversation at a time, and everyone gets a turn
Work habits	How the team runs day to day	Meetings start on time, and every task has an owner and a due date
Decisions	How choices get made	We agree on how a decision will be made before we make it

Decide How You'll Decide

A lot of team conflict about decisions is really conflict about process. One person assumed the leader would decide. Another assumed there would be a vote. Settle this early. The common options are simple.

The leader decides after input. This is fast and clear, and it works well when time is short or the leader will be held accountable. It works best when members can see their input was actually used.

Majority vote. This is quick and feels fair, but a narrow vote can leave nearly half the team unhappy.

Consensus. Everyone can live with and support the decision, even if it wasn't their first choice. It takes longer but builds strong commitment. Chapter 6 shows how to reach consensus without endless debate.

Different decisions can use different methods. What matters is that everyone knows which method applies before the discussion starts.

Turn Goals Into Clear Objectives

Chapter 1 showed how to set a team goal that is specific, measurable, and has a deadline. On a team with several moving parts, break that goal into objectives. For each objective, answer four questions.

1. What does done look like?
2. How will we measure it?
3. When is it due?
4. Who owns it?

Here is how the refrigerated shipments team at Cedarview broke down its six-week goal once it finally sat down to do it in week three.

Objective	Measure	Due	Owner
Find where the wrong delivery windows come from	Cause confirmed with data	End of week three	Farah
Fix the routing data that feeds the tracking system	Test shipments show correct windows	End of week five	Marcus and Owen

Objective	Measure	Due	Owner
Tell affected customers what happened	Every affected customer contacted	End of week five	Priya
Confirm the fix holds	No new errors for one full week	End of week six	Owen

Keep the Rules Alive

Ground rules only work if the team uses them. Post them where everyone can see them, and review them every month or so. When someone breaks a rule, raise it early and calmly. A quick “we agreed on one conversation at a time” is much easier than a hard conversation after months of frustration.

Try This at Work

1. At your next meeting, ask the team to write three ground rules, one each for respect, communication, and work habits.
2. Pick one upcoming decision and agree now on how it will be made.
3. Take your team’s main goal and break it into objectives using the four questions.

Discussion Questions for Your Team

1. What unwritten rules does your team follow right now? Which ones help, and which ones hurt?
2. Think of a decision that caused conflict on your team. Was the conflict about the choice itself, or about how it was made?
3. Which of your team’s current objectives has no clear owner?

Module 12: Working as a Distributed Team

A distributed team has members in different places. Some work from home, some work in other buildings or cities, and some work in different time zones. Many teams are now a mix, with some people together in one room and others joining on a screen.

Distributed teams can work very well. But they lose the everyday contact of a shared workplace, like a hallway chat or the chance to notice that someone looks frustrated. A distributed team has to build that connection on purpose.

What Gets Harder at a Distance

Less casual contact. Fewer chance conversations mean relationships and trust grow more slowly.

Silence is hard to read. When a remote member goes quiet, others can’t tell whether they agree, disagree, or just can’t find a way into the conversation.

Written words lose tone. A short message can read as cold or annoyed even when it wasn’t meant that way.

Remote members get left out. In mixed meetings, the people in the room tend to talk to each other, and the people on the screen fade into the background.

Time zones shrink the day. When members work different hours, there is less time when everyone is available.

Practices That Make Distance Work

Set a steady rhythm. Hold regular check-ins, even when things are quiet. Teams that only talk during emergencies never build much trust.

Make meetings fair for remote members. If some people are remote, give them the first turn to speak on each topic, or have everyone join from their own screen. Keep notes in a shared document so everyone sees the same thing.

Write it down. Decisions, action items, and changes should live in one shared place, not in someone's memory of a hallway conversation.

Add warmth to written messages. A greeting, a little context, and a clear request go a long way. When a topic gets tense, switch from text to a call.

Name a coordinator. Someone should keep the shared calendar, track who needs what, and make sure no one is left out of the loop.

Meet in person when you can. Even one or two face-to-face meetings build trust that carries a team through the months when everyone is on screens.

Match the Tool to the Need

When You Need To	Best Choice	Why
Share a quick update or question	Chat or instant message	It's fast, and people can answer when they're free
Share details people will need later	Email or a shared document	It's easy to find and refer back to
Solve a problem or make a decision	Video call	Faces and voices help people read each other
Work through tension or bad news	Video call, phone, or in person	Tone matters too much for text
Track tasks and deadlines	A shared task tracker	Everyone sees the same status

Back at Cedarview

Farah was the only remote member of the refrigerated shipments team, and in the early meetings she had faded into the background. The others sat around a conference table talking over each other, while Farah watched on a screen two states away.

In week three, the team changed its habits. Farah got the first turn on every agenda item. Priya kept the notes in a shared document that everyone could see as it was written. When Owen and Farah disagreed about the data, they talked it through on a video call instead of trading short, tense messages. Farah went from the quietest person on the team to the one who found the source of the problem.

Try This at Work

1. At your next mixed meeting, give remote members the first turn on each topic. Notice what changes.

2. Reread the last three work messages you sent. Would they sound warm and clear to someone who couldn't hear your voice?

3. Agree with your team on which tool to use for which need, using the table as a starting point.

Discussion Questions for Your Team

1. What is hardest about working with the distributed members of your team? What have you tried?

2. When did a written message cause a misunderstanding on your team? How was it resolved?

3. If your team could meet in person once this year, what would you most want to accomplish?

Chapter Summary

By week five, the refrigerated shipments team looked nothing like the group that had sat through four useless meetings. It had ground rules posted in its shared document, a clear owner for every objective, and a habit of hearing from Farah first. Owen still pushed hard, but now he pushed on the problem instead of on Marcus. The team had moved from storming into norming, and the fix was on track for its deadline. Then Dana told them she was adding a fifth member.

Here are the most important ideas from this chapter to carry forward:

1. How a team works together matters more than who is on it. Psychological safety, the belief that it is safe to speak up and admit mistakes, is the foundation for everything else.

2. Teams move through forming, storming, norming, and performing, then adjourning. Friction during storming is normal, and teams can slide backward when things change.

3. Build a team around the work, not around who you know. Weigh attitude along with skill, and keep the team as small as possible and as large as necessary.

4. Every team needs formal roles with clear owners and a balance of natural roles. Knowing each person's roles helps a team cover its gaps and understand its friction.

5. Set ground rules, decision methods, and clear objectives early and on purpose. Distributed teams need extra structure to replace the everyday contact a shared workplace provides.

Building Team Cohesion

Trust, Identity, Team Building, and Healthy Conflict

Opening Story: The New Person Nobody Asked For

In week six, Dana added a fifth member to the refrigerated shipments team. Renata Osei was a systems specialist transferring in from Cedarview's Duluth facility, which was being downsized. She knew the tracking software better than anyone in the company. She also knew nobody on the team, and the team was not in the mood to slow down for a newcomer one week before its deadline.

Renata's first week did not go smoothly. In her second meeting, she questioned the fix Owen and Marcus had spent days building. She wasn't trying to cause trouble. From her years working inside the tracking system, she could see that their approach would break the tracking of shipments moved between warehouses a few steps down the line.

Owen took it personally. Marcus stayed quiet in the meeting, then complained to Priya afterward. "The new person has been here five days and she's already telling us our work is wrong."

Priya was stuck. As far as she could tell, Renata was right. But the team's new sense of unity was fraying fast, and nobody would say out loud what was really bothering them. It wasn't the technical disagreement. It was a stranger showing up at the worst possible moment and telling everyone their work needed to change.

Priya didn't know whether the team would come out of this stronger. She did know that ignoring it wouldn't help.

Module 13: Fostering Relationships and Trust

Clear goals, roles, and rules give a team its structure. Relationships give it strength. When the work gets hard, people push through for teammates they know and trust. They rarely push through for a name on an organization chart.

Three things make people want to give their best to a team. First, they feel valued as individuals, not just as job titles. Second, they have real working relationships with their teammates. Third, they feel proud of the team and connected to the organization it serves. This module covers the first two. Module 14 covers the third.

Two Kinds of Trust

Trust has two parts, and teams need both.

Trust in reliability. You believe teammates will do what they say, on time, at the quality they promised.

Trust in intentions. You believe teammates mean well, even when they disagree with you or make a mistake.

A coworker can be completely reliable and still not be trusted if people suspect their motives. Another can be warm and well-meaning but not trusted with deadlines. Real trust needs both parts, and both are built the same way: through many small moments, over time.

How Trust Gets Built and Broken

Trust Builders	Trust Breakers
Keeping small promises, like sending the file when you said you would	Missing small commitments and hoping nobody notices
Sharing information freely	Holding back information to protect your position
Saying “I don’t know” when you don’t	Bluffing to avoid looking uninformed
Giving credit publicly and specifically	Taking credit for shared work
Assuming good intent, then asking questions	Assuming the worst and talking about it behind someone’s back
Admitting mistakes quickly	Hiding mistakes until they can’t be hidden

Repairing Trust After It Breaks

Everyone breaks trust sometimes, usually by accident. What matters is what happens next. Trust can almost always be rebuilt, but only through action. These steps work in almost any situation.

1. Name what happened specifically. Vague apologies sound like you’re hoping it will blow over.
2. Take responsibility without excuses. Explaining is fine. Excusing is not.
3. Say what you will do differently, in concrete terms.
4. Follow through, every time, for as long as it takes. Trust returns slowly, one kept promise at a time.

Get to Know the Person, Not Just the Role

Relationships at work don’t require friendship. They require knowing enough about each other to work well together. A short one-on-one conversation goes a long way, especially with someone new. Here are a few questions worth asking.

1. What part of your work do you enjoy most?
2. What should I know about how you like to work?
3. What is something you know a lot about that the team might not realize?
4. What gets in your way when you’re trying to do your best work?

Listen more than you talk, and remember what you hear. Few things build a relationship faster.

Try This at Work

1. Pick one teammate you know least well. Ask them two of the questions above this week.

2. For one week, track every small promise you make at work. Keep every one of them, or renegotiate before the deadline instead of after.

Discussion Questions for Your Team

1. Think of a coworker you trust completely. Which kind of trust do you have in them, reliability, intentions, or both? What built it?

2. Which trust breaker from the table have you seen damage a team? What would have repaired it?

3. How well do you really know the people you work with most? What would help you know them better?

Module 14: Creating a Team Identity

People don't just belong to groups. Groups become part of who people are. In the 1970s, social psychologists Henri Tajfel and John Turner developed what is now called social identity theory. Their work showed that people take part of their sense of self from the groups they belong to. Belonging to a group they can feel proud of helps them feel good about themselves.

Tajfel's experiments also showed how quickly this happens. Even when people were sorted into groups for trivial reasons, they tended to favor members of their own group. That tells you two things about teams. A shared identity forms easily, and it is powerful. It can pull a team together, or it can push outsiders away.

Building an Identity That Helps

A purpose people can say in one sentence. Every member should be able to explain what the team is for and why it matters. If people can't say it, they can't be proud of it.

A name and a shared story. Many teams pick a name or a nickname. It seems small, but it gives people something to rally around. The story of how the team got through a hard stretch does the same thing.

Shared wins and simple traditions. Marking progress together, even with something as small as a short celebration when a milestone is hit, strengthens the feeling of us.

A link to the bigger picture. Show how the team's work connects to the organization's mission and its customers. People care more about a team when they can see how it helps something they believe in.

When Identity Goes Too Far

A strong identity has a dark side. Teams can start to see other departments as rivals instead of partners. They can close ranks against new members. They can protect the team's image instead of admitting problems. When us starts to require a them, the identity is doing damage.

Healthy Team Identity	Unhealthy Team Identity
Proud of the work and the people	Proud of being better than other teams

Healthy Team Identity	Unhealthy Team Identity
Welcomes new members and their ideas	Treats newcomers as outsiders to be tested
Cooperates with other departments	Competes with or blames other departments
Admits mistakes openly	Protects the team's image at all costs
Connected to the organization's goals	Focused only on the team's own interests

Back at Cedarview

Somewhere around week four, the refrigerated shipments team had started calling itself the Cold Chain Crew. Owen wrote the name on the whiteboard in the project room as a joke, and it stuck. The name helped. People worked a little harder for the Crew than they had for "the tracking fix project."

But when Renata arrived, the name had an unexpected side effect. She wasn't part of the Crew. She was the new person from Duluth. The identity that had pulled four people together was now keeping a fifth person out.

Try This at Work

1. Ask each member to write the team's purpose in one sentence. Compare the sentences and agree on one version.
2. Check your team against the unhealthy identity column. If any row sounds familiar, name it at your next meeting.

Discussion Questions for Your Team

1. What makes you proud of your team? Would your teammates give the same answer?
2. Have you seen a team's identity turn into us versus them? What caused it?
3. How does your team's work connect to your organization's mission? Could everyone on the team explain that connection?

Module 15: Using Team-Building Activities That Work

Say the words team building and many people picture trust falls, ropes courses, or awkward icebreakers. Some of those activities are fun. But do they actually help a team work better?

What the Research Says

In 2009, Cameron Klein and his colleagues combined the results of many studies on team building. They found that team building does help, with a moderate positive effect overall. The biggest gains showed up in how members felt about the team and in how well they worked together.

They also compared four common types of team building. Activities focused on goal setting and role clarification had the strongest effects. In other words, the most useful team building helps people agree on what the team is trying to do and who owns what. Activities aimed only at getting people to like each other, or at solving puzzles unrelated to the work, did less. The researchers also found that larger teams tended to benefit more than smaller ones.

That doesn't make fun activities worthless. Enjoying time together has value. But if you only have one hour, spend it building clarity, not just rapport.

Four Types of Team Building

Type	What It Does	Example
Goal setting	Gets everyone aligned on what success looks like	The team agrees on three measurable goals for the next quarter
Role clarification	Makes clear who does what and who decides what	Each member describes their role, and others say what they need from it
Interpersonal relations	Builds trust and understanding between members	Members share a work experience that shaped how they approach their job
Problem solving	Practices working through a challenge together	The team tackles a real work problem using a structured method

Quick Activities That Build Clarity

Start, stop, continue. Each member writes one thing the team should start doing, one thing it should stop, and one thing it should keep. Group the answers and pick one of each to act on.

Role expectations exchange. Each person says what they believe their role is. Teammates then say what they need from that role. Gaps and overlaps show up fast.

Picture of success. Ask everyone to describe what the team's work will look like when it is truly done well. Differences in the answers reveal where the goal needs to be sharpened.

How I work best. Each member shares a few short notes on how they like to communicate, when they do their best thinking, and what frustrates them. It takes fifteen minutes and prevents weeks of friction.

Making Any Activity Work

Connect it to real work. Activities stick when people can see how they apply to their actual jobs. Use real goals and real problems whenever you can.

Keep participation comfortable. Never force people to share personal information or do something physically uncomfortable. Forced vulnerability builds resentment, not trust.

Keep it short and focused. An hour with a clear purpose usually beats a full day of loosely connected games.

Always debrief. The learning happens in the conversation afterward, not in the activity itself.

A good debrief can be as simple as four questions.

1. What happened?
2. What did we do well as a team?
3. What got in our way?
4. What will we do differently at work because of this?

Try This at Work

1. Plan a thirty-minute role clarification session. Each member describes their role, then each teammate says one thing they need from that role.

2. The next time your team does any group activity, save ten minutes for the four debrief questions.

Discussion Questions for Your Team

1. What team-building activity have you done that actually changed how your team worked? What made it effective?

2. Which of the four types would help your team most right now? Why?

3. Have you ever felt pushed into an uncomfortable activity at work? What effect did it have on the team?

Module 16: Overcoming Resistance and Welcoming New Members

Change often meets resistance, and forming a new team is a change. So is adding someone to an existing team. People may resist even when the change is a good one. Understanding why helps you respond with patience instead of frustration.

Why People Resist

Loss of control. People worry that decisions they used to make will now be made by the team, or by someone new.

More work. Team projects often land on top of regular jobs. People resist when nobody has taken anything off their plate.

Uncertainty. When people don't know what the change means for them, they tend to assume the worst.

Loyalty to the old way. People who helped build the current approach may feel that changing it says their work wasn't good enough.

Not invented here. Ideas from outsiders, including new members, often get rejected simply because they came from outside.

Signs of Hidden Resistance

Resistance is not always loud. Often it looks like cooperation on the surface. Watch for these quieter signs.

Agreement without action. People nod in meetings, then nothing changes.

Endless questions and delays. Every step needs more study before anyone will commit to it.

"We tried that before." Past failures are used to shut down any new attempt.

Private complaints. Concerns get shared in the hallway or after the meeting instead of in the room where they could be addressed.

Responding to Resistance

Resistance is information. It tells you what people are worried about. The worst response is to ignore it or push harder. A better response usually includes these steps.

1. Listen first. Ask what concerns people have, and don't argue while they answer.
2. Explain the why. People accept change more readily when they understand the reason behind it.
3. Involve people. Give them a real role in shaping how the change happens.
4. Show early wins. A small, visible success makes the change feel real and worthwhile.
5. Be patient. Most people need time to adjust, and pushing too hard often backfires.

Bringing a New Member Onboard

Joining an established team is hard. The team already has habits, inside jokes, and history that the new person doesn't share. In 2007, Talya Bauer and her colleagues combined results from 70 samples of new employees to learn what helps newcomers succeed. Three things stood out. New people adjust best when they understand their role, feel confident they can do it, and feel accepted by the people around them. When those three are in place, newcomers tend to perform better, feel more satisfied, and stay longer.

A team can help with all three. Here is a simple checklist.

What Newcomers Need	How the Team Can Help
Role clarity	Explain the goal, the history, and exactly what the new person will own
Confidence	Give them an early task they can succeed at, and support them while they do it
Acceptance	Assign a buddy, include them in informal conversations, and introduce them to key people
A voice	Ask directly for their fresh perspective, since new people see what insiders have stopped noticing

Back at Cedarview

Looking back, Priya realized the team had done none of this for Renata. Nobody had explained the project's history or why Owen and Marcus had chosen their approach. Nobody had asked what she saw that they might be missing. She had been handed a seat at the table and left to figure out the rest. Her blunt challenge in week six wasn't only her fault. The team had given her no other way in.

Try This at Work

1. Think of a change your team is resisting. Write down which of the five reasons might be behind it, then ask someone to see if you're right.
2. Write a one-page welcome guide for your team: the goal, the history, the key people, and the unwritten rules.

Discussion Questions for Your Team

1. Think of a time you resisted a change at work. What was really behind it? What eventually helped?
2. How was your own first week on your current team? What would have made it better?
3. When did a newcomer's fresh perspective improve something on your team?

Module 17: Coping With Conflict and Ego

Every team has conflict. The question is not whether it happens but what kind it is and how the team handles it. Handled well, disagreement surfaces better ideas and catches mistakes. Handled badly, it poisons relationships and stalls the work.

Task Conflict and Relationship Conflict

Researchers separate conflict into two main kinds. Task conflict is disagreement about the work, such as which approach to take or what the data means. Relationship conflict is personal friction, such as annoyance, dislike, or clashing personalities.

For years, many textbooks taught that task conflict helps teams while relationship conflict hurts them. In 2003, Carsten De Dreu and Laurie Weingart tested that idea by combining the results of many studies. They found that both kinds of conflict tended to hurt team performance and satisfaction. A larger review in 2012, led by Frank de Wit, added an important detail. Relationship conflict was consistently harmful. Task conflict was not, and it was more likely to help when it did not spill over into personal friction.

The practical lesson is simple. Disagree about the work. Protect the relationship. A debate about the best approach can make a team smarter. The moment it becomes about who is right, or who is smarter, it starts doing damage.

When Ego Gets Involved

Ego turns task conflict into relationship conflict. When someone's idea is challenged, it can feel like their competence or status is being challenged too. People defend their ideas harder, stop listening, and start keeping score.

A few habits help keep ego out of it. Talk about the idea, not the person who proposed it. Treat ideas as belonging to the team once they are shared. Ask questions before making counterpoints. And when you're wrong, say so quickly.

Habits for Healthy Debate

Argue from evidence. Back up a position with facts and examples, not volume or rank. "Here's what the data shows" beats "Trust me."

Restate before you rebut. Before disagreeing, sum up the other person's view well enough that they would agree with your summary. It proves you listened, and it often reveals that you disagree less than you thought.

Set the limits. Agree on how long the discussion will run and how the decision will be made, so debate doesn't go on forever.

Commit once it's decided. After a fair discussion, support the team's decision even if you argued against it. You can raise it again later if new facts appear, but not by quietly working around it.

Five Common Responses to Conflict

In the 1970s, researchers Kenneth Thomas and Ralph Kilmann described five ways people tend to respond to conflict. Each one mixes two things: how hard you push for your own concerns, and how much you try to meet the other person's concerns. No single style is always right. Skilled team members choose the style that fits the situation.

Response	What It Looks Like	When It Fits	Risk If Overused
Competing	Pushing for your own position	Emergencies or clear safety issues	Others feel run over and stop speaking up
Collaborating	Working together to find a solution that meets both sides' needs	Important issues where both views matter	Takes time that small issues don't deserve
Compromising	Each side gives up something to meet in the middle	Time is short and both sides have fair points	Nobody gets what the work really needs
Avoiding	Stepping away from the issue	Trivial issues or when people need to cool down	Problems grow while nobody deals with them
Accommodating	Giving the other side what they want	The issue matters far more to them than to you	Resentment builds, and your ideas go unheard

Working Through a Conflict

When a conflict between two teammates needs to be addressed, these steps work whether you are one of the people involved or someone helping them.

1. Pick the right time and place. Talk privately, when both people are calm.
2. Let each person describe the issue without interruption, focusing on what happened and why it matters to them.
3. Find the shared goal. Most workplace conflicts are between people who want the same result but see different paths to it.
4. Generate options together. Look for solutions that meet both people's real needs, not just their stated positions.
5. Agree on a next step, and set a time to check back on how it's working.

Back at Cedarview

Priya finally pulled Owen and Renata into a small conference room, away from the rest of the team. She asked each of them to say what was really bothering them. Owen admitted it wasn't

the technical point. He felt his work had been dismissed by someone who had just arrived. Renata admitted she had been so focused on flagging the risk that she never thought about how it would land.

Once that was said out loud, the technical question got much easier. They agreed on a shared goal, a fix that would still work six months from now. Then they ran a quick test of both approaches on a copy of the tracking system. Renata's concern turned out to be real. Owen was the one who suggested how to combine the two approaches, keeping most of the work he and Marcus had already done. It was collaboration, not surrender, and both of them knew it.

Try This at Work

1. Think of a current disagreement on your team. Is it task conflict, relationship conflict, or both? What would it take to keep it focused on the work?

2. Look at the five responses. Which one do you use most? Pick one situation this week where a different response would fit better, and try it.

Discussion Questions for Your Team

1. Describe a time a disagreement made your team's work better. What kept it productive?

2. When have you seen ego turn a work disagreement into a personal one? What might have stopped it?

3. Which of the five responses does your team overuse? What has that cost you?

Module 18: Difficult Team Members and Constructive Feedback

Most difficult behavior on teams is not caused by difficult people. It is caused by people under stress, people who are confused about expectations, or people whose habits clash with the team's norms. That's good news, because behavior can change once it is named clearly and respectfully.

Common Difficult Behaviors

Two principles apply to every behavior in the table below. Talk about the behavior, not the person's character. And talk privately first. Calling someone out in front of the team almost always makes things worse.

Behavior	What Might Be Behind It	What to Try
Dominating discussions	Enthusiasm, anxiety, or habit	Use round-robin turns, and thank them before inviting others in
Staying silent	Uncertainty, a different style, or feeling unsafe	Ask directly and privately, or let them share in writing first
Missing deadlines	Overload, unclear priorities, or low commitment	Ask what's getting in the way before assuming the worst
Shooting down every idea	Real concerns, or a need to feel heard	Ask them to pair each objection with a possible fix
Side conversations	Boredom or disagreement they won't say openly	Refer to the ground rules, then ask for their view out loud

Giving Constructive Feedback

Constructive feedback is information that helps someone improve. It works best when it is specific, timely, and about behavior the person can actually change. One widely used approach from the Center for Creative Leadership is called Situation, Behavior, Impact.

Situation. Say when and where it happened. “In this morning’s planning meeting...”

Behavior. Describe what the person actually did, the way a camera would have recorded it. “...you interrupted Farah three times while she was explaining the data...”

Impact. Explain the effect it had. “...and she stopped sharing her analysis, which is the part we need most.”

Then stop and listen. Ask something like, “How did it look from your side?” The other person may have context you don’t. End by agreeing on what will happen next time.

Notice what this approach leaves out: labels like “rude,” guesses about motives, and piles of old complaints. Those make people defensive. Specific facts make the conversation about something that can be fixed.

Back at Cedarview

After the conversation with Owen and Renata, Priya had one more to handle. Marcus had spent a week complaining about Renata to anyone who would listen, but never to Renata. Priya asked him to grab a coffee.

“Last week, after the meeting where Renata raised her concern,” she said, “you told me and two people from Dispatch that she was slowing us down. You never said it to her. It meant the rest of us heard about the problem, but she never got the chance to respond.”

Marcus was quiet for a moment. “I didn’t want a fight in front of everyone,” he said. “And honestly, I wasn’t sure she was wrong.” They agreed that next time, he would bring concerns to the person directly, or to the team, and not around them. It took five minutes. It saved weeks.

Receiving Feedback Well

Feedback only works if it can be heard. When someone gives you feedback, listen without interrupting. Ask questions to understand it. Thank them, since giving feedback takes courage. Then decide what to do with it. You don’t have to agree with all of it, but you do owe it real consideration.

When Behavior Doesn’t Change

Sometimes a private, respectful conversation isn’t enough. If the behavior continues, have a second, more direct conversation about the consequences, and keep brief notes. If it still doesn’t change, bring in the team leader or manager. Protecting the team is part of the job.

Try This at Work

1. Write out one piece of feedback you’ve been putting off, using Situation, Behavior, Impact. Read it aloud and remove any labels or guesses about motives.

2. Ask a teammate for feedback on one specific thing, such as how you run meetings. Practice receiving it well.

Discussion Questions for Your Team

1. Which difficult behavior from the table is most common on your team? What might really be behind it?
2. Think of the best feedback you ever received. What made it useful?
3. Why do people avoid giving feedback? What would make it easier on your team?

Chapter Summary

The Cold Chain Crew changed after that conversation in the small conference room. Owen and Renata presented the combined fix together at the next meeting. Priya asked Renata to walk the whole team through how the tracking system worked behind the scenes, something none of them had ever really understood. Marcus asked the most questions. With Dana's agreement, the team pushed its deadline back two weeks to build the fix properly. Before the next meeting, someone added a fifth name to the whiteboard under Cold Chain Crew.

Here are the most important ideas from this chapter to carry forward:

1. People give their best when they feel valued as individuals, have real relationships with teammates, and feel proud of the team and connected to the organization.
2. Trust has two parts, reliability and intentions, and both are built through many small actions over time.
3. A shared identity pulls a team together, but it turns harmful when it depends on shutting out newcomers or competing with other teams.
4. The best team building builds clarity about goals and roles. Newcomers succeed when they understand their role, feel confident, and feel accepted.
5. Disagree about the work and protect the relationship. Choose your response to conflict on purpose, and give feedback about specific behavior, not character.

Leading a Team

Stepping Up, Starting Strong, and Seeing the Work Through

Opening Story: An Offer Priya Didn't See Coming

The Cold Chain Crew's fix went live two weeks late, and it worked. Over the next month, complaints about refrigerated delivery windows fell by more than half. Renata's approach turned out to prevent a much bigger rebuild later. Even Marcus admitted the team was better for having her on it.

A few weeks later, Dana asked Priya to stop by her office. Cedarview was starting a new project to cut down on return-shipment errors across all five regional warehouses. Returned freight was being sent to the wrong location, billed at the wrong rate, or lost in the system altogether. It was messy, it crossed every department, and nobody had been able to fix it. "I want you to lead it," Dana said.

Priya's first reaction was somewhere between flattered and terrified. She had never officially led anything. She liked solving problems herself, and she wasn't sure she would like spending her days making sure other people solved them. She also knew exactly who would be on the team. Some of them had been her peers a week ago.

"Take the week," Dana said. "Really think about it. I'd rather you say no now than say yes and regret it in a month."

Module 19: Deciding Whether to Lead and Preparing Yourself

Leading a team is a different job from being on one. As a team member, you succeed through your own work. As a leader, you succeed through other people's work. You spend less time doing and more time clearing the way, making decisions, having hard conversations, and keeping everyone pointed in the same direction. Some people love that shift. Others find they miss doing the work themselves. Both reactions are normal.

Questions to Ask Before You Say Yes

1. Do I want to spend much of my time helping others succeed, instead of doing the work myself?
2. Am I ready to own problems I didn't cause, including other people's mistakes?
3. Do I have the time this role will really take, or will something else need to give?
4. Does this fit where I want my career to go?
5. Why do I want it? Is it for the title, or because I want to help a team do good work?

There are no wrong answers, only honest and dishonest ones. Saying no to a leadership role that doesn't fit is a better decision than saying yes and struggling for a year.

The Accidental Manager

If you feel unprepared to lead, you have plenty of company. In 2023, the Chartered Management Institute had the polling firm YouGov survey more than 4,500 workers and managers in the United Kingdom. It found that 82 percent of people who move into management had received no formal management or leadership training. The institute calls them accidental managers: people promoted because they were good at their old job, then left to figure out the new one on their own.

The lesson is not that you need a degree before you can lead. It's that leadership skills don't appear automatically with a new title. They have to be built on purpose.

Preparing Yourself to Lead

Find someone to learn from. Pick a leader you respect and watch how they handle hard moments: a meeting going sideways, bad news, a disagreement. Ask them how they decide what to do.

Volunteer for small leadership moments. Run a meeting, organize a small project, or train a new hire. Small chances to lead build skill with low risk.

Learn how decisions really get made. Every organization has an official process and a real one. Find out who has influence, who needs to be consulted, and how things actually get approved.

Get training on purpose. Courses, workshops, books, and coaching all help. Don't wait for someone to offer.

Know your gaps. Be honest about what you're not good at yet. Then either build that skill or make sure someone on the team covers it.

Does Personality Matter?

In 2002, Timothy Judge and his colleagues combined results from 73 samples to see how personality relates to leadership. They used the five-factor model, often called the Big Five. Extraversion, the tendency to be outgoing and energetic, was the most consistent link to leadership. Conscientiousness, meaning being organized and dependable, and openness to new ideas came next. People who tend toward anxiety and worry scored somewhat lower on leadership. Agreeableness had only a weak link.

Two cautions keep this in perspective. First, the connections were moderate, not destiny. Plenty of effective leaders don't fit the profile. Second, extraversion was more strongly tied to being picked as a leader than to being an effective one. Outgoing people tend to get noticed. Quieter people who are organized, curious, and steady often lead just as well once they have the chance.

Leading People Who Used to Be Your Peers

Stepping up to lead former coworkers is one of the hardest transitions at work. Yesterday you were equals. Today you are responsible for their work. A few habits make it easier.

Name the change. Talk openly about the new arrangement instead of pretending nothing changed. Most people appreciate the honesty.

Meet one-on-one early. Ask each person what they need from you and what worries them about the change.

Be fair, visibly. Former close friends shouldn't get the best assignments. Others will be watching for it.

Don't overcorrect. Suddenly acting bossy to prove you're in charge damages trust fast. You can stay friendly while still making the calls.

Back at Cedarview

Priya spent the week doing exactly what Dana suggested. She answered the five questions honestly, and not all of the answers were comfortable. By Friday, she had decided. She wasn't chasing a title. She wanted to help a team do good work, the way Marcus, Owen, Farah, and Renata had helped her do good work all year. She walked into Dana's office and said yes.

Try This at Work

1. Answer the five questions in writing about a leadership role you have now or might want someday.
2. Name one leader you respect. Ask them for twenty minutes to talk about how they handle a hard moment.

Discussion Questions for Your Team

1. What surprised you most the first time you led something, even something small?
2. Have you seen someone struggle after being promoted over former peers? What would have helped?
3. What is one leadership skill you could start building this month?

Module 20: Starting Strong With a New Team

A team's first few weeks set patterns that are hard to change later. If meetings start late in week one, they will probably start late in week ten. If the leader makes every decision alone at the start, members will stop offering ideas. Starting strong means setting the patterns you want on purpose.

Listen Before You Change Things

New leaders are often eager to prove themselves by making changes right away. It usually backfires. Before changing anything, find out what people know, what has already been tried, and what they worry about. Meet with each member one-on-one and ask a few simple questions.

1. What do you think this team needs to get right?
2. What has gotten in the way of solving this problem before?
3. What do you want to get out of being on this team?
4. How do you like to get feedback and updates?

Hold a Real Kickoff

The first full team meeting should answer the questions every member is quietly asking. Chapter 2 covered the pieces. The kickoff is where they come together.

Kickoff Topic	Question It Answers
Purpose	Why does this team exist, and why does it matter?
Goal and objectives	What does success look like, and by when?
Roles	Who owns what, and who is the sponsor outside the team?
Ground rules	How will we treat each other and run our meetings?
Decision methods	How will we make decisions, and who has the final say?
First steps	What happens this week, and who is doing it?

Delegate From Day One

Many new leaders hold on to too much work, either because it feels faster to do it themselves or because they don't want to burden anyone. That leaves the leader overloaded and the team underused. Good delegation follows five steps.

1. Match the task to a person whose skills fit it or who wants to grow into it.
2. Explain the result you need and why it matters, not just the steps.
3. Agree on how much authority they have, using the levels from Chapter 1.
4. Set check-in points so problems surface early.
5. Let them do it their way. Taking the work back at the first bump teaches people not to try.

Model What You Expect

People watch what a leader does far more closely than what a leader says. If you want meetings to start on time, be early. If you want people to admit mistakes, admit yours first. If you want honest disagreement, thank the first person who disagrees with you in public.

Aim for an Early Win

Don't try to fix everything in the first month. Pick one small, visible success the team can reach quickly. An early win builds confidence, shows the rest of the organization that the team is making progress, and gives members a reason to believe the bigger goal is possible.

Back at Cedarview

Priya opened her new team's kickoff with the Cold Chain Crew's one-page lessons and the two things that team had gotten wrong. Then she walked through the purpose, the goal, the roles, and the ground rules. Dana joined for the first ten minutes to explain why the project mattered to Cedarview and to say out loud that she was the team's sponsor.

When it came to first steps, Priya's instinct was to map the return process herself, since she knew the customer side best. Instead, she gave it to Marcus, who knew how shipments moved through Dispatch and wanted a bigger role. She explained the result she needed, agreed that he could contact anyone in Dispatch or billing without checking with her first, and set a check-in for the end of week four. Then she left it alone.

Try This at Work

1. If you lead a team, ask each member the four listening questions this month, even if the team isn't new.
2. Look at your task list. Pick one task to delegate this week, and walk through all five delegation steps.

Discussion Questions for Your Team

1. Think of the best start you've seen on a new team. What did the leader do in the first few weeks?
2. Why do new leaders find it hard to delegate? What makes it easier?
3. What early win could your current team go after in the next thirty days?

Module 21: Leading With Diplomacy and Managing Up

Diplomacy means getting things done while keeping relationships intact. A team leader works in two directions at once: down toward the team and up toward the people the leader reports to. Both relationships need care.

Leading Your Team With Diplomacy

Be visible and approachable. Check in often, informally, not just when something goes wrong. People bring problems to leaders they see and trust.

Praise in public, correct in private. Public praise builds pride. Public correction builds resentment and fear.

Let ideas develop before you judge them. Shooting down an idea in the first thirty seconds teaches people to stop offering them. Ask questions first.

Explain your decisions. People accept decisions they disagree with much more readily when they understand the reasoning, especially unpopular ones.

Spread the good work around. Watch for patterns where the same people always get the interesting assignments and others always get the tedious ones. Fairness is one of the first things a team notices.

Managing Up

In 1980, John Gabarro and John Kotter published a well-known Harvard Business Review article called "Managing Your Boss." Their point was simple and still true. You and your manager depend on each other. Your manager needs your work and information. You need their support, resources, and influence. Managing that relationship on purpose is part of doing your job well, not office politics.

Learn what matters to your manager. Find out their goals, the pressures they face, and what they will be judged on. Then show how your team's work helps.

Match their communication style. Some managers want a short written summary. Others want a quick conversation. Ask which they prefer, and use it.

Avoid surprises. Your manager should never hear about a problem on your team from someone else first.

Deliver bad news early and in person. Bad news gets worse with time. Share it as soon as you know, face to face or by phone when you can.

Bring a solution with every problem. Even a rough proposal shows judgment and makes the conversation about fixing things.

When Managing Up, Do This	Avoid This
Send short, regular updates in the format your manager prefers	Going silent until something goes wrong
Raise problems early with a proposed fix	Hoping problems will solve themselves
Keep every commitment you make, or renegotiate early	Promising more than the team can deliver
Ask what your manager's own priorities are	Assuming you already know

Back at Cedarview

Priya's first update to Dana was a two-page report. Dana thanked her, then asked a question the report answered on page two. Priya realized Dana was reading updates on her phone between meetings. From then on, Priya sent a weekly note with three short lines: what's done, what's next, and what's stuck. Dana started replying within the hour.

In week three, Priya learned that the Appleton warehouse hadn't been recording return reasons for months. She walked to Dana's office that afternoon instead of waiting for the weekly note, and she brought a proposal to rebuild the missing data from shipping records. Dana approved it on the spot.

Try This at Work

1. Ask your manager how they prefer to receive updates, and adjust your next update to match.

2. Check your team's last month of assignments. Did the interesting work go to the same few people?

Discussion Questions for Your Team

1. What does your manager care most about right now? How confident are you in that answer?

2. Describe a time bad news was delivered well at work. What made it work?

3. When have you seen a leader shut down an idea too quickly? What did it cost?

Module 22: Listening and Reading the Intangibles

Most leaders think of themselves as good listeners. Their teams don't always agree. Listening is one of the most underrated leadership skills, because so much of what a leader needs to know is never said directly. It shows up in a pause, a change of tone, or a question someone almost asks.

Four Listening Styles

In 1995, communication researchers Kittie Watson, Larry Barker, and James Weaver described four listening styles. Each style focuses on something different when another person is talking. Most people lean toward one or two. These are preferences, not abilities. Anyone can learn to listen in all four ways.

Style	Focuses On	Strength	Watch Out For
People-oriented	The speaker's feelings and the relationship	Builds trust and makes people feel heard	Can get pulled into feelings and lose the point
Action-oriented	What needs to be done	Moves quickly from talk to action	Can get impatient with background or detail
Content-oriented	Facts, evidence, and accuracy	Spots weak reasoning and missing facts	Can seem critical or slow to trust
Time-oriented	Getting to the point efficiently	Keeps conversations focused and on schedule	Can cut people off before they're finished

A Quick Listening Self-Check

Which of these sound most like you? Pick one or two.

1. People-oriented: When someone talks, I notice how they feel about it, and I care about keeping the relationship strong.
2. Action-oriented: I want to know what the person needs me to do, and I get restless when they don't get to it.
3. Content-oriented: I listen for facts and evidence, and I often have questions about whether something is accurate.
4. Time-oriented: I like conversations to be brief and on topic, and I notice when one is running long.

Knowing your style helps in two ways. It shows you what you might be missing when you listen. And it helps you adapt when you talk to someone with a different style. Give action-oriented listeners the request first. Give content-oriented listeners the evidence. Tell time-oriented listeners up front how long you need. Let people-oriented listeners know how the issue affects the people involved.

Habits of Active Listening

1. Give your full attention. Put the phone down and turn away from the screen.
2. Let the person finish before you respond, even when you think you know where they're going.
3. Ask open questions, like what happened next, or what worries you most about it.
4. Paraphrase to check your understanding. "So the main issue is the timing, not the cost?"
5. Notice what isn't said. A long pause or a quick change of subject is information too.

Reading the Intangibles

Some of the most important things on a team can't be measured on a report. Good leaders watch for them anyway.

Fairness. Do people believe rules and opportunities are applied the same way to everyone?

Openness. Is information shared freely, or do people feel left in the dark?

Honesty. Can people tell the leader the truth, including unwelcome truth?

Loyalty in both directions. Does the leader stand up for the team with higher-ups, not just carry messages down?

Energy. Is the team's energy rising or falling? Quiet meetings, missed deadlines, and short tempers are often early signs of trouble.

Back at Cedarview

In the new team's second week, Willa, a warehouse supervisor from the Appleton facility, flatly disagreed with Priya's plan to audit return errors warehouse by warehouse. She said it in front of everyone, and her tone was sharp. For a second, Priya felt the urge to defend her plan. She was supposed to be running this thing.

Instead, she asked Willa to walk the team through her concern. Willa explained that Appleton handled returns through a separate dock with its own process, so an audit built around the other four warehouses would miss half of Appleton's errors. Priya paraphrased it back, "So we need a different audit for Appleton, not just the same one run five times?" Willa nodded. The plan changed that afternoon.

Months later, Willa told Priya that was the moment she decided Priya was worth being honest with.

Try This at Work

1. Take the listening self-check, then ask a coworker which style they see in you.
2. In your next three conversations, paraphrase what the other person said before you respond.

Discussion Questions for Your Team

1. Which listening style is most common on your team? Which is missing?
2. Think of a time someone misunderstood you because they listened for something different than you meant. What happened?
3. Which intangible, fairness, openness, honesty, loyalty, or energy, needs the most attention on your team right now?

Module 23: Running Team Projects Like a Project Manager

Most team work is project work: a defined goal, limited time, limited resources, and many moving parts. You don't need a project management certification to run a project well. You do need a plan, and a good plan covers six things: the tasks, the timeline, the resources, the stakeholders, regular check-and-review points, and the problems that could get in the way.

Define Success and Set the Boundaries

Start by writing down what the finished project will deliver and how you'll know it succeeded. Then write down what is not included. This is called the scope. A clear scope protects a team from scope creep, the slow pile-up of "while you're at it, could you also" requests that can sink a project.

Break the Work Into Tasks

Big goals are hard to act on. Break the work into tasks small enough that each one can be assigned to one owner and finished in a week or two. If a task feels vague, it is probably still too big. Keep breaking it down until every piece has a clear first step.

Build a Planning Grid

A planning grid puts the whole plan on one page. Each row is a task. The columns show who owns it, when it starts and ends, what it needs, and where it stands. Here is the first part of the grid for Priya's return-errors team.

Task	Owner	Start	Due	Resources Needed	Status
Pull six months of return records from all five warehouses	Farah	Week 1	Week 2	Database access and IT help	Done
Rebuild missing Appleton return reasons from shipping records	Willa	Week 3	Week 5	Shipping records and one clerk's time	In progress
Interview return-dock staff at each warehouse	Owen and Willa	Week 2	Week 4	Travel to two sites	In progress
Map how a return moves from pickup to billing	Marcus	Week 4	Week 6	Dispatch and billing contacts	Not started
Share early findings with the sponsor	Priya	Week 6	Week 6	Thirty minutes with Dana	Not started

Show the Timeline Visually

Many teams also draw the plan as a simple timeline chart, sometimes called a Gantt chart after Henry Gantt, the engineer who popularized it. Each task is a bar stretching across the weeks it will take. At a glance, everyone can see what is happening now, what overlaps, and which tasks must finish before others can start. A spreadsheet or a sheet of paper works just as well as special software.

Know Your Stakeholders

Stakeholders are the people affected by the project or able to affect it. They include customers, other departments, the people who will have to change how they work, and the leaders who approve resources. Projects rarely fail because the team missed a technical detail. They fail because someone important was surprised, ignored, or never convinced.

Stakeholder	What They Care About	How We'll Keep Them Informed
Dana, the project sponsor	Progress, risks, and cost	Weekly three-line note and a monthly meeting
Warehouse managers	Extra work for their staff	A heads-up before any site visit
Billing department	Accurate charges on returns	Invite to review the process map
Customers with open return complaints	Getting their freight and refunds sorted out	Updates through Customer Resolutions

Plan Check-and-Review Points

Set regular points to check progress against the plan. At each one, ask three questions. Are we on schedule? Are we still solving the right problem? What has changed that the plan doesn't reflect yet? A plan is a tool, not a promise carved in stone. Update it whenever reality changes.

Plan for What Could Go Wrong

A potential problem analysis looks ahead at what could go wrong, before it does. For each risk, decide how likely it is, how much damage it would do, how to prevent it, and what you'll do if it happens anyway.

Potential Problem	Likelihood	Impact	Prevention	Backup Plan
Warehouse staff too busy for interviews	Medium	Medium	Schedule around shift changes	Short written questionnaire
Return data is incomplete at more sites	High	High	Check data quality in week one	Rebuild from shipping records
Marcus pulled back to Dispatch full time	Low	High	Agree on his two days in writing with his manager	Farah covers the process map

Try This at Work

1. Take a current project and build a planning grid for the next month. Give every task one owner.

2. List three things that could go wrong on that project. For each, write one way to prevent it and one backup plan.

Discussion Questions for Your Team

1. Think of a project that went off track. Was the cause unclear scope, missing tasks, surprised stakeholders, or an unplanned problem?
2. Who are the stakeholders for your team's current work? Which one gets the least attention?
3. How often does your team check its progress against the plan? Is it often enough?

Module 24: Celebrating Success and Concluding Team Activities

Teams often race from one task to the next without stopping to notice what they accomplished. They also tend to end badly, simply drifting apart when the work is done. Both are missed opportunities. Celebrating builds momentum, and closing well turns a team's experience into lessons the whole organization can use.

Celebrate Along the Way

Mark milestones, not just the finish line. A long project needs small celebrations along the way to keep energy up.

Be specific. Name what was accomplished and who made it happen, using the appreciation pattern from Chapter 1.

Look for quiet contributions. The most visible people aren't always the ones who did the most. Ask around.

Invite leaders in. A few minutes of thanks from a senior leader means a great deal to a team, and it makes the team's work visible.

Closing Out the Work

When a project ends, finish it on purpose. Write a short final summary of what the team delivered. Hand off any ongoing tasks to a named owner, so nothing falls through the cracks. Thank the stakeholders who helped. Then hold an after-action review.

The After-Action Review

The after-action review was developed by the United States Army and is now used by many organizations. It is a short, blame-free conversation built around four questions.

1. What did we expect to happen?
2. What actually happened?
3. Why was there a difference?
4. What will we keep doing, and what will we do differently next time?

Two rules make it work. Focus on what happened and why, not on who to blame. And make sure everyone speaks, not just the most senior or most vocal members. Write the lessons down in one page and share them with teams that will face similar work.

Back at Cedarview

Before her new team's kickoff, Priya asked Dana for one more hour with the Cold Chain Crew. They ran an after-action review. They had expected six weeks and took eight. The difference came down to two things: nobody was named leader at the start, and nobody onboarded Renata. What worked was worth keeping, too: giving remote members the first turn, doing the role self-check, and settling decisions on how to decide before the hard ones came up.

Farah wrote it all up on one page. Dana brought Cedarview's vice president of operations to the last ten minutes to thank the team in person. Priya took the one-page summary straight into her new team's kickoff and started with the two things they had gotten wrong.

Try This at Work

1. Pick a recent milestone your team reached and celebrate it this week, even briefly.
2. Run an after-action review on a finished project using the four questions. Keep it to thirty minutes.

Discussion Questions for Your Team

1. How does your team usually end a project? What gets lost?
2. Who on your team makes quiet contributions that rarely get noticed?
3. What lesson from a past project should your team be using right now but isn't?

Chapter Summary

By the end of her first month as a leader, Priya had a team and a planning grid. She had held a kickoff that started with lessons learned, and she had a sponsor who read her updates within the hour. Willa had become one of her most honest voices. Marcus was adjusting, slowly, to taking direction from someone who used to sit across the aisle. The team had a plan for studying the return errors. What it didn't have yet was a clear picture of the problem itself. Everyone had a theory, and the theories didn't agree.

Here are the most important ideas from this chapter to carry forward:

1. Leading means succeeding through other people's work. Decide honestly whether you want that, then prepare on purpose, since most new leaders start with no formal training.
2. Start strong by listening first, holding a real kickoff, delegating from day one, and aiming for an early win.
3. Lead your team with diplomacy, and manage up by learning what matters to your manager, avoiding surprises, and bringing solutions with problems.
4. Know your listening style and adapt to others. Watch the intangibles, such as fairness, openness, honesty, loyalty, and energy.
5. Run projects with a clear scope, a planning grid, a stakeholder plan, check-and-review points, and a potential problem analysis. Celebrate along the way and close with an after-action review.

Defining the Real Problem

Problem Statements, Root Causes, and Common Traps

Opening Story: Five Theories, No Answers

Priya's return-errors team had a plan, a sponsor, and a planning grid. It also had five different explanations for the problem, one from each member.

Owen was sure it was the drivers. "They grab returns without checking the paperwork," he said. Willa blamed the billing software, which she had never trusted. Marcus thought customers were filling out return forms wrong. Farah suspected data entry. Priya, who had spent a year hearing angry customers on the phone, had her own theory about unclear instructions from the sales team.

Each theory sounded reasonable. Each came from someone who knew part of the process well. And each person had a fix ready to go. Owen wanted driver retraining. Willa wanted new software. The meeting was turning into a debate about solutions to a problem nobody had actually pinned down.

Priya stopped it. "We've got five fixes for a problem we can't describe in one sentence," she said. "What if we're all a little right? Or all wrong?"

Nobody had an answer. That was the moment the team stopped arguing about fixes and started trying to understand the problem.

Module 25: What Problem Solving Really Is

A problem is a gap between what is happening and what should be happening. Returns should reach the right warehouse and be billed correctly. Some don't. That gap is the problem. Problem solving is the work of understanding the gap well enough to close it for good.

That last part matters. Plenty of problems get patched. Far fewer get solved. A patch makes today's trouble go away. A real solution makes sure it doesn't come back.

Symptoms and Root Causes

A symptom is what you can see. A root cause is why it happens. A warning light on a car's dashboard is a symptom. Putting tape over the light makes the symptom disappear, but the engine is still in trouble. Many workplace fixes are tape over the light.

The test of a root cause is simple. If you remove it, does the problem stop happening? If the problem would come back anyway, you haven't found the root yet.

Symptom	Patch	Possible Root Cause
Customers complain about late deliveries	Apologize and offer a discount	Pickup schedules don't allow enough time for loading
The same report keeps having errors	Have a second person check it	The report pulls data from two systems that don't match
New hires quit within three months	Hire more people faster	The job was described inaccurately during hiring
A machine keeps jamming	Clear the jam and restart	The material being fed into it is the wrong thickness

Blame the Process, Not the Person

When something goes wrong, the natural question is who made the mistake. It's usually the wrong question. W. Edwards Deming, one of the founders of the modern quality movement, argued that most problems in organizations come from the system people work in, not from the people themselves.

Think about it this way. If three different people in the same job all make the same mistake, the problem probably isn't the people. Something about how the work is set up is making that mistake easy. Replace the person, and the next person will likely make the same mistake. Fix the process, and the mistake stops.

This doesn't mean people are never responsible. It means you should look at the process first. A problem solver's best question is not who did this, but what about the way we work allowed this to happen.

Not Every Problem Is the Same Kind

Before choosing a method, it helps to know what kind of problem you're facing. This way of sorting problems draws on the Cynefin framework developed by Dave Snowden, simplified here for everyday team use.

Most problems a team gets assigned are complicated. They feel mysterious, but the cause can be found. That is where this chapter's tools do their best work. Treating a complicated problem as simple leads to patches. Treating a complex problem as merely complicated leads to endless analysis, when a small experiment would teach you more.

Kind of Problem	What It Looks Like	Best Approach
Simple	The cause is obvious and the fix is known	Just fix it, and write down the fix so it sticks
Complicated	The cause is hidden but can be found with analysis	Gather data and use root-cause tools like the ones in this chapter

Kind of Problem	What It Looks Like	Best Approach
Complex	Many causes interact, and there is no single root	Try small, safe changes, watch what happens, and adjust

The Road Ahead

The second half of this book follows the path a team takes to solve a real problem. This chapter covers the front end: defining the problem, gathering the facts, and finding the root cause. Chapter 6 covers thinking clearly and deciding together. Chapter 7 puts the whole process together as the 7-Step Method, and Chapter 8 adds tools for mapping processes, choosing solutions, and testing them.

Try This at Work

1. Think of a problem your team has fixed more than once. Write down the symptom and the patch. What might the root cause be?

2. The next time something goes wrong, replace the question “who did this?” with “what about our process allowed this?”

Discussion Questions for Your Team

1. What problem at your workplace keeps coming back? Why hasn’t it been solved for good?

2. Think of a time someone was blamed for a mistake that the process made easy. What should have changed?

3. Which is harder for your team, patience to find root causes, or the discipline to fix them once found?

Module 26: Writing a Clear Problem Statement

A problem that can’t be described clearly can’t be solved well. The problem statement is the team’s shared description of the gap. It keeps everyone working on the same problem, and it becomes the yardstick for whether the solution worked.

What a Good Problem Statement Includes

What is happening. Describe the problem in specific, observable terms.

Where and when. Say where the problem shows up and over what period of time.

How big it is. Use numbers whenever you can: how often, how many, how much.

Why it matters. Name the impact on customers, costs, safety, or people.

Just as important is what a good problem statement leaves out. It doesn't include a cause, because you don't know the cause yet. It doesn't include a solution, because that locks the team into one answer too early. And it doesn't blame anyone, because blame makes people defensive and hides information.

Weak Statement	What's Wrong With It	Stronger Statement
Returns are a mess.	Too vague to measure	About 8 percent of returns over the past six months were billed or routed incorrectly.
The drivers don't check return paperwork.	Assumes a cause and blames a group	Return shipments frequently arrive with paperwork that doesn't match the freight.
We need new billing software.	States a solution, not a problem	Billing errors on returns led to more than 400 customer complaints in six months.
Customer service could be better.	No size, place, or time	Average hold time in Customer Resolutions rose from four minutes to eleven since March.

A Simple Way to Draft One

If you're stuck, answer these prompts in order and then combine the answers into two or three sentences.

1. Over what period of time has this been happening?
2. What exactly is going wrong, described so that anyone could observe it?
3. Where does it happen?
4. How often, how many, or how much?
5. What does it cost the customer, the organization, or the people involved?

Then read the draft out loud to someone outside the team. If they can explain the problem back to you without asking what you mean, the statement is ready.

Narrow It Down With Is and Is Not

In the 1960s, management consultants Charles Kepner and Benjamin Tregoe popularized a simple technique for sharpening a problem statement. For each part of the problem, ask where it is happening and where it is not, when it happens and when it doesn't, and so on. The contrast between the two columns often points straight toward the cause.

Here is how Priya's team used it. One term needs a quick explanation first. Every shipment has a freight class, a shipping category based mainly on the freight's size, weight, and packaging. The class helps decide what the customer pays and where the shipment is routed.

Question	The Problem Is	The Problem Is Not
What	Returns billed at the wrong freight class or sent to the wrong warehouse	Errors on regular outbound shipments
Where	Mostly at the Appleton and Eau Claire warehouses	Spread evenly across all five warehouses
When	Every week, with more errors on high-volume days	Limited to one shift or one season
How big	About 8 percent of all returns	A handful of rare cases

What the Contrast Revealed

Once the table was filled in, one question jumped out. What is different about Appleton and Eau Claire? Nobody on the team knew yet. But it was a far better question than whose theory was right.

Back at Cedarview

Farah pulled six months of return records from all five warehouses. The team wrote and rewrote its problem statement four times. The final version read like this.

Over the past six months, 1,510 of Cedarview's 18,400 return shipments, about 8 percent, were billed at the wrong freight class or sent to the wrong warehouse. The errors led to more than 400 customer complaints and an estimated 140,000 dollars in reshipping costs and customer credits.

Owen read it and frowned. "It doesn't say anything about the drivers." Priya nodded. "That's the point. It doesn't say anything about any of our theories yet."

Try This at Work

1. Write a problem statement for a problem your team faces. Check it for a cause, a solution, or blame, and take out anything you find.
2. Fill in an is and is not table for the same problem. What question does the contrast raise?

Discussion Questions for Your Team

1. Why do teams jump to solutions before they can describe the problem clearly?
2. Think of a problem statement at your workplace that quietly blamed someone. How did it affect the people involved?
3. What numbers would you need to size up a problem your team is facing right now? Where could you get them?

Module 27: Owners, Stakeholders, and Getting the Facts

No one person sees a whole process. The warehouse worker sees the dock. The billing clerk sees the invoice. The customer sees the late refund. Solving a problem well means gathering those views and then checking them against real facts.

Know Who Owns the Problem

The problem owner is the person with the authority and responsibility to fix the problem, or to approve the fix. Identify that person early. A team that solves a problem nobody with authority wants solved will watch its work sit on a shelf. For Priya's team, the owner was Dana, the project's sponsor, who could approve changes across all five warehouses.

Then list the other stakeholders: everyone who touches the process or is affected by it. Each one holds a piece of the picture. They are also the people who will have to live with the solution, so involving them early makes the final change much easier to put in place.

Go and See

Lean manufacturing, which grew out of the Toyota Production System, has a Japanese word for the place where the work actually happens: gemba. Lean teams teach a simple habit. Before you decide what's wrong, go to the gemba and watch.

Reports, spreadsheets, and meetings describe the work secondhand. Walking the floor shows you what really happens, including the workarounds nobody mentions in meetings. When you go, watch before you talk. Ask the people doing the work to show you how they do it and where it gets hard. Listen more than you explain. They know things no report will tell you.

Good Questions to Ask Where the Work Happens

1. Can you walk me through how you do this, step by step?
2. Where does this usually go wrong?
3. What do you do when it goes wrong?
4. What workarounds have you come up with?
5. If you could change one thing about this process, what would it be?

Listen for the difference between facts and opinions. "We get about ten of these a day" is a fact you can check. "The drivers never care" is an opinion. Both are useful, but only facts can be counted. When you hear an opinion, a friendly "How do you know?" often turns up the facts behind it.

Collect Data With a Checksheet

Opinions tell you where to look. Data tells you what you'll find. One of the simplest data tools is a checksheet, a form for tallying how often something happens, sorted into categories. Anyone can use one, and it turns vague impressions into numbers.

Here is the checksheet Priya's team used at all five warehouses for two weeks. Each mark was one return error, sorted by type and location.

Error Type	Green Bay	Appleton	Eau Claire	Duluth	Minneapolis	Total
Wrong freight class	3	19	14	2	4	42
Wrong destination warehouse	2	8	6	1	2	19
Missing or mismatched paperwork	3	2	3	2	2	12
Damaged during return	1	1	0	1	1	4
Other	1	1	1	0	1	4
Total	10	31	24	6	10	81

Find the Vital Few

Quality pioneer Joseph Juran noticed that in most problems, a small number of causes account for most of the trouble. He called them the vital few, and he named the pattern the Pareto principle, after an Italian economist who noticed a similar imbalance in how wealth was distributed. The exact split varies, but the lesson holds. Find the few categories that cause most of the problem and start there.

A Pareto chart shows this by sorting categories from largest to smallest and adding a running total. Here is Priya's checksheet data sorted that way.

Error Type	Count	Share of All Errors	Running Total
Wrong freight class	42	52 percent	52 percent
Wrong destination warehouse	19	23 percent	75 percent
Missing or mismatched paperwork	12	15 percent	90 percent
Damaged during return	4	5 percent	95 percent
Other	4	5 percent	100 percent

Back at Cedarview

The numbers settled a lot of arguments in one afternoon. Two error types made up three quarters of the problem. Two warehouses, Appleton and Eau Claire, accounted for more than two thirds of all errors. Missing paperwork, the heart of Owen's driver theory, was real but small, and it was spread evenly across all five sites.

Then Renata, who had joined as an advisor on the tracking system, pointed out something nobody else had noticed. Cedarview's routing system decides where to send freight partly based on its freight class. If the class was wrong, the destination would often be wrong too. The top two error types might not be two problems at all. They might be one.

Try This at Work

1. Pick a recurring problem and design a simple checksheet with four or five categories. Use it for one week.
2. Spend thirty minutes at the place where a problem actually happens. Watch first, then ask the people doing the work to show you where it gets hard.

Discussion Questions for Your Team

1. Who owns the biggest problem your team is facing? Does that person know they own it?
2. When did going to see the work firsthand change your understanding of a problem?
3. Which of your team's beliefs about a problem have never been checked against data?

Module 28: Finding Root Causes With the Five Whys

The Five Whys is the simplest root-cause tool there is. It was developed at Toyota and made famous by Taiichi Ohno, the engineer who built the Toyota Production System. You state the problem, ask why it happens, then ask why again about the answer, and keep going until you reach a cause you can actually fix.

How It Works

1. Write down the problem, using your problem statement.
2. Ask why it happens. Write down the answer.
3. Ask why that answer is true. Write down the next answer.
4. Keep asking until you reach a cause in the process that, if fixed, would stop the problem from coming back.
5. Check each answer against facts before moving to the next why.

Five is a guideline, not a rule. Some problems reach their root in three whys. Others take seven. Stop when you reach something the team can act on and that explains the problem.

A Worked Example

Priya's team took its biggest error type to Appleton, the warehouse with the most errors. Owen and Willa worked through the whys with the returns dock staff, and they didn't accept an answer until they could back it up.

Question	Answer	How We Know
Why are returns billed at the wrong freight class?	The freight class on the return label doesn't match what's in the box	Owen checked thirty labels against the freight on the dock

Question	Answer	How We Know
Why doesn't the label match?	The class on the label is copied from the original outbound order	Dock staff showed Willa the label screen
Why is it copied from the original order?	The return-label template fills in the freight class automatically	Renata confirmed the template settings
Why is the automatic class often wrong?	Customers often repack returns in different packaging, which changes the class	Customer Resolutions notes and photos from the dock
Why hasn't anyone caught it?	The template never asks staff to check the class, and only these two warehouses still use it	IT records show the other three warehouses upgraded to a template that requires staff to enter the class by hand

The Root Cause

The root cause: an outdated return-label template at two warehouses fills in a freight class that is often wrong for returned freight. Nothing in the process prompts anyone to check it. Nobody had been careless. The template was doing exactly what it was built to do.

The Classic Example

Taiichi Ohno described the Five Whys in his book about the Toyota Production System with an example about a machine that stopped working. Why did it stop? A fuse blew because the machine was overloaded. Why was it overloaded? A bearing wasn't getting enough oil. Why not? The oil pump wasn't pumping enough. Why not? Its shaft was worn and rattling. Why was it worn? There was no strainer, so metal scraps were getting into the pump.

Replacing the fuse would have restarted the machine for a while. Installing a strainer kept it from failing the same way again. That is the whole idea of the Five Whys in one story.

Common Five Whys Mistakes

Stopping at a person. If an answer is "because someone made a mistake," keep going. Ask why the process made that mistake easy to make.

Guessing instead of checking. Each answer should be backed by facts. An unchecked guess at why number two sends the rest of the chain in the wrong direction.

Following only one path. Many problems have more than one cause. If a why has several possible answers, follow each one, or switch to the cause-and-effect diagram in the next module.

Going too far. Keep asking until you reach something the team can fix. "Because customers exist" is technically true and completely useless.

Try This at Work

1. Run the Five Whys on a small, recent problem. For each answer, write down how you know it's true.

2. Listen for “because someone made a mistake” in your team’s explanations. Ask one more why each time you hear it.

Discussion Questions for Your Team

1. Why is it tempting to stop asking why once you find a person to blame?
2. Think of a problem at your workplace. How many whys do you think it would take to reach the real root?
3. When have you seen a guess treated as a fact during problem solving? What happened?

Module 29: The Cause-and-Effect Diagram

The Five Whys follows one path deep. Some problems need the opposite: a wide look at every possible cause before digging in. For that, teams use the cause-and-effect diagram, developed by Japanese quality expert Kaoru Ishikawa. It is often called a fishbone diagram because of its shape.

What It Looks Like

Picture a fish skeleton lying on its side. The problem is written at the head. A long spine runs back from the head, and several large bones branch off the spine. Each large bone is a category of possible causes. Smaller bones branching off each category are specific causes the team comes up with. On a whiteboard or a large sheet of paper, the finished diagram shows the whole range of possible causes at a glance.

Common Categories

Teams can choose whatever categories fit the problem, but many start with these six.

People. Skills, training, staffing, and workload.

Methods. Procedures, rules, and the steps of the process.

Machines. Equipment, tools, and software.

Materials. Supplies, parts, forms, and information going into the process.

Measurement. How the work is checked, counted, and inspected.

Environment. Physical conditions, timing, space, and outside pressures.

How to Build One

1. Write the problem statement at the head of the fish.
2. Draw the spine and label a bone for each category.
3. Brainstorm possible causes under each category. At this stage, every idea goes on the diagram.
4. For each cause, ask why it might happen, and add the answers as smaller bones.
5. Circle the causes the team thinks are most likely.
6. Test the circled causes with data before treating any of them as the answer.

That last step is the one teams skip most often, and it matters most. A fishbone diagram shows possible causes, not proven ones. It organizes the team's thinking. It does not replace the facts.

Tips for a Good Fishbone Session

Invite the people who do the work. The best causes usually come from the people closest to the process, not the people furthest from it.

Separate brainstorming from judging. Collect every idea first. Arguing about causes too early shuts down the quieter members.

Keep causes specific. "Training" is too vague to test. "New dock staff get no training on freight classes" can be checked.

Put the same cause in more than one place if it fits. That often signals an important cause that touches several parts of the process.

Back at Cedarview

Before the Five Whys trip to Appleton, Priya's team had spent one long afternoon building a fishbone diagram on the project room whiteboard. The problem at the head read: returns billed at the wrong freight class. Here is what the team came up with, shown as a table.

Category	Possible Causes the Team Listed
People	New dock staff not trained on freight classes. Drivers picking up returns without checking packaging.
Methods	Appleton's separate returns dock follows its own process. No step to verify the class before labeling.
Machines	The return-label template fills in the class automatically. Older scanners at two sites.
Materials	Customers repack returns in different packaging. Return forms are unclear about packaging.
Measurement	Freight class is never checked at receiving. Errors are only found at billing, weeks later.
Environment	High-volume days rush the dock staff. The returns dock is short on space.

Where the Branches Met

The team circled four likely causes. The checksheet data and the Five Whys then showed which one mattered most. The template was listed under Machines, but it only caused errors because of two other entries: customers repacking under Materials, and nobody checking under Measurement. The diagram helped the team see that the root cause lived where those three branches met.

Try This at Work

1. Draw a fishbone diagram with your team for a current problem. Set a rule that no idea gets debated until the brainstorming is done.

2. Circle the three most likely causes. For each, decide what data would prove or disprove it.

Discussion Questions for Your Team

1. When would you choose the Five Whys, and when would you choose a fishbone diagram?
2. Which category of causes does your team tend to overlook?
3. Why do teams often treat the causes on a fishbone diagram as proven? What would keep your team from doing that?

Module 30: Avoiding Common Problem-Solving Traps

Most failed problem solving doesn't fail because people aren't smart enough. It fails because of a handful of predictable traps. Knowing them by name makes them much easier to spot, in your own thinking and in your team's.

Jumping to solutions. The team starts debating fixes before it understands the problem. It feels productive, but it usually means solving the wrong problem well.

Treating the symptom. The fix makes the visible trouble go away while the root cause keeps producing it. Watch for problems that keep coming back after they have been fixed.

Blaming a person. A name gets attached to the problem, the person gets retrained or replaced, and the process that made the mistake easy stays exactly the same.

Trusting the loudest theory. The most senior, most confident, or most persistent person's explanation wins without being tested. Confidence is not evidence.

Fixing what's easy instead of what matters. The team picks the cause it knows how to fix, not the one causing most of the problem. The Pareto chart is the cure.

Biting off too much. A problem like "improve customer satisfaction" is too big to solve. Break it into specific, measurable problems and take them one at a time.

Analysis paralysis. The opposite trap: the team keeps collecting data long after it knows enough to act. Set a deadline for analysis, and remember that a small test can answer questions that more study can't.

The Traps at a Glance

Trap	Warning Sign	What to Do Instead
Jumping to solutions	Fixes are debated before the problem is written down	Agree on a problem statement first
Treating the symptom	The same problem keeps coming back	Ask why until you reach the process
Blaming a person	The explanation ends with someone's name	Ask what made the mistake easy to make
Trusting the loudest theory	The debate is won by confidence, not evidence	Test every theory against data

Trap	Warning Sign	What to Do Instead
Fixing what's easy	The chosen cause is minor but familiar	Use a Pareto chart to find the vital few
Biting off too much	The problem can't be measured	Break it into smaller, specific problems
Analysis paralysis	Months of study with no action	Set a deadline and run a small test

Are We Ready to Solve It?

Before a team moves from understanding a problem to fixing it, it should be able to answer yes to each of these questions.

1. Do we have a clear problem statement that everyone agrees on?
2. Do we know who owns the problem and who the key stakeholders are?
3. Have we seen the work firsthand and heard from the people who do it?
4. Do we have data showing where and how often the problem happens?
5. Have we identified a root cause and checked it against facts?
6. Can we explain how fixing that cause would close the gap in the problem statement?

Any no is a sign to slow down. A few more days of understanding the problem can save months of solving the wrong one.

Back at Cedarview

Looking back, Priya could see how close the team had come to three of these traps in its first meeting. Five people had jumped to five solutions. The loudest theories had been winning. And Owen's driver retraining would have fixed a real problem, the missing paperwork, which turned out to be only 15 percent of the errors. The team would have spent weeks retraining drivers and watched the error rate barely move.

Try This at Work

1. Review a problem your team solved in the past year. Which trap, if any, did the team fall into?

2. Post the traps table in your team's meeting space. When someone spots a trap in a discussion, they can name it.

Discussion Questions for Your Team

1. Which trap is your team most likely to fall into? Why that one?

2. How can a team member point out a trap without sounding like they are criticizing a coworker's idea?

3. When is it right to act before all the data is in?

Chapter Summary

It took Priya's team five weeks to go from five theories to one root cause. When Priya presented the findings, she started with the problem statement, then the checksheet, then the

Pareto chart, then the Five Whys. By the time she reached the template, nobody in the room was surprised. Owen was the first to say it. “So it wasn’t the drivers. It was never really about anybody.” The team now knew exactly what was wrong. The next question was harder. What should they do about it? Everyone had a favorite fix, and this time the stakes were real.

Here are the most important ideas from this chapter to carry forward:

1. A problem is a gap between what is happening and what should be happening. Real solutions remove the root cause, not just the symptom.

2. Look at the process before blaming a person. If several people make the same mistake, the process is making it easy.

3. A clear problem statement says what, where, when, how big, and why it matters, with no cause, solution, or blame. An is and is not table sharpens it.

4. Go see the work, gather the views of the people who do it, and collect data with tools like the checksheet and the Pareto chart to find the vital few.

5. Use the Five Whys to dig deep and the fishbone diagram to look wide. Check every possible cause against facts, and watch for the common traps.

Thinking Critically and Deciding Together

Sound Reasoning, Brainstorming, and Reaching Consensus

Opening Story: Everyone's Favorite Fix

The root cause was clear. An outdated return-label template at Appleton and Eau Claire filled in the wrong freight class, and nothing prompted anyone to check it. Now the team had to decide what to do about it, and everyone had a favorite fix.

Willa wanted the old template replaced with the newer one the other three warehouses used. Renata said reconfiguring the old template to require a manual entry would be faster and cheaper. Farah wanted the billing system to flag any return whose freight class didn't match its weight. Owen wanted a verification step at the dock. Marcus wanted clearer return instructions for customers.

Then an IT manager stopped by the meeting and said something that nearly ended the discussion. "Don't install the new template. It caused chaos when Green Bay switched over." A few minutes later, Dana stepped in for a quick update and mentioned that she liked the idea of a full replacement. "Clean slate," she said. Within five minutes, the whole team was nodding along with Willa's plan.

Priya noticed something that bothered her. Nobody had checked the claim about Green Bay. And nobody had disagreed with Dana. The team had gone from five opinions to one in the time it took the sponsor to walk through the door.

Module 31: What Critical Thinking Looks Like at Work

Critical thinking is careful, honest thinking about what to believe and what to do. It means questioning claims instead of accepting them, weighing the evidence behind them, considering other explanations, and noticing when your own preferences are steering your conclusions.

Chapter 5 showed how to find the real problem. That work depended on critical thinking at every step: checking theories against data, asking how you know, and refusing to stop at the first plausible answer. Deciding what to do about a problem depends on it just as much.

Habits of a Critical Thinker

Ask how we know. Every claim rests on something. Find out what.

Separate facts, opinions, and assumptions. A fact can be checked. An opinion is a judgment. An assumption is something taken for granted without being checked. All three show up in every discussion, often in the same sentence.

Consider other explanations. For any result, ask what else could have caused it.

Look for what would prove you wrong. It is easy to find evidence that you're right. It is more useful to look for evidence that you're not.

Change your mind when the evidence changes. This is a strength, not a weakness. The goal is to be right in the end, not to have been right at the start.

Critical Thinking Is Not Criticism

Some people hear the word critical and think negative. That's a misunderstanding. Critical thinking is curious, not hostile. It applies the same questions to your own ideas as to everyone else's. The difference shows up in how people talk.

Critical Thinking Sounds Like	Criticism Sounds Like
"What data do we have on that?"	"That's ridiculous."
"What else could explain it?"	"You always jump to conclusions."
"What would have to be true for this to work?"	"That will never work."
"I think I was wrong about this part."	"I told you so."

Thinking and Feeling

Critical thinking doesn't mean ignoring emotions. Feelings are information. A nagging worry about a plan may be your experience noticing a risk before you can name it. But strong feelings can also drive reasoning in the wrong direction. When you notice yourself feeling strongly about a decision, slow down and ask whether the feeling is pointing to evidence or replacing it.

Try This at Work

1. In your next meeting, listen for one claim that everyone accepts without question. Ask, in a curious tone, how we know it's true.

2. Take a belief you hold about your work. Write down what evidence would change your mind. Then go look for it.

Discussion Questions for Your Team

1. When has your team accepted a claim that turned out to be wrong? What question would have caught it?

2. How can someone ask how do we know without sounding like they are attacking a coworker?

3. When did a strong feeling about a work decision turn out to be right? When did it turn out to be wrong?

Module 32: Weighing Claims and Evidence

A claim is a statement someone wants you to accept. An argument is a claim plus the reasons for believing it. Workplaces run on arguments: this vendor is better, this process is slower, this

plan will work. Learning to take an argument apart is one of the most practical thinking skills there is.

Break an Argument Into Parts

The claim. What exactly are we being asked to believe or do?

The reasons. Why should we believe it?

The evidence. What facts support those reasons?

The assumptions. What has to be true for the reasons to lead to the claim, even though nobody said it out loud?

Take the IT manager's warning. The claim was that Cedarview shouldn't install the new template. The reason was that it caused chaos at Green Bay. The evidence was not stated. And there were two hidden assumptions: that the template itself caused the chaos, and that what happened at Green Bay would happen again at Appleton and Eau Claire. Neither assumption had been checked.

How Strong Is the Evidence?

Not all evidence is equally trustworthy. Here is a rough ladder, from strongest to weakest. Even strong evidence can be misread, but the higher you climb, the safer your footing.

Type of Evidence	Example	Strength
Measured data from the actual process	Six months of return records	Strongest
Direct observation	Watching the returns dock for a full shift	Strong
Records and documents	IT change logs and training records	Strong, if complete
Firsthand accounts	A dock worker describing what happened	Moderate
Secondhand reports	Someone who heard about it from a coworker	Weak
Assumptions and hunches	Everyone knows the drivers don't care	Weakest

Questions to Test Any Claim

1. What exactly is being claimed?
2. What is the evidence, and where does it sit on the ladder?
3. Is the source in a position to know? Do they have a reason to lean one way?
4. What else could explain the same facts?
5. What evidence would change our minds?

Judging a Source

Much of what reaches a team comes from other people. Before trusting a source, run it through five quick checks.

Check	Question to Ask
Expertise	Does this person know this subject well?
Access	Were they in a position to see what they're describing, or did they hear it secondhand?
Motive	Would they gain or lose anything depending on what we believe?
Track record	Have their past claims held up?
Confirmation	Does anyone or anything else back this up?

Connection Is Not Cause

Two things happening together doesn't mean one causes the other. Early in the project, Owen noticed that errors spiked on days when one particular driver worked. It looked like proof of his theory. But that driver worked Mondays and Fridays, the two busiest return days of the week. The busy days were connected to both the driver and the errors. The driver wasn't the cause. The volume was.

When two things seem linked, ask whether a third factor could be driving both, and whether the cause might run in the opposite direction from the one you assumed.

Back at Cedarview

Priya asked Farah to check the Green Bay claim. Farah pulled the records. The switch to the new template had been rough for about two weeks. But the problems came from staff who were never trained on the new screens, not from the template itself. After the rough patch, Green Bay's return errors dropped and stayed low.

The IT manager's warning was partly true and mostly misleading. The rollout had gone badly. The template hadn't. The real lesson was one the team could use: whatever fix they chose, training would make or break it.

Try This at Work

1. Pick a claim you heard at work this week. Break it into claim, reasons, evidence, and assumptions.

2. For one decision your team is facing, list the evidence you have and place each piece on the ladder.

Discussion Questions for Your Team

1. What hidden assumptions sit underneath a plan your team is working on right now?

2. When have you seen two things treated as cause and effect when something else was driving both?

3. Whose claims does your team tend to accept without question? Why?

Module 33: Spotting Reasoning Traps and Mental Shortcuts

The human brain takes shortcuts. Most of the time they help, letting us make quick judgments without thinking through every detail. But in 1974, psychologists Amos Tversky and Daniel Kahneman showed that these shortcuts also produce predictable errors. Their work, and decades of research since, identified mental traps that catch nearly everyone, including smart, experienced people.

Four Common Mental Traps

Confirmation bias. We notice evidence that supports what we already believe and overlook evidence that doesn't. Owen spent weeks noticing every driver mistake and missing the pattern at the two warehouses.

Anchoring. The first number we hear pulls our judgment toward it. In one of Tversky and Kahneman's experiments, people watched a wheel that was rigged to stop on either 10 or 65. Then they estimated what percentage of United Nations member countries were in Africa. People who saw 10 gave a median, or middle, guess of 25 percent. People who saw 65 guessed 45 percent. A random number moved their answers by twenty points. At work, the first estimate, budget, or deadline mentioned tends to anchor everything that follows.

Availability. Things that are vivid or recent feel more common than they are. One furious customer call can feel more important than a report showing a hundred quiet problems.

Sunk cost. We stick with something because of what we've already put into it, even when switching would be better. The money, time, or effort already spent is gone either way. The only question that matters is what will work best from here.

Two Kinds of Reasoning

Most arguments use one of two kinds of reasoning, and each can go wrong in its own way.

Deductive reasoning moves from a general rule to a specific conclusion. Every return at this warehouse uses the old template. This return came from this warehouse. So this return used the old template. If the starting rule is true and the logic is sound, the conclusion must be true. The weak point is the rule itself. If it isn't really true of every case, the conclusion falls apart.

Inductive reasoning moves from specific examples to a general conclusion. Thirty labels at Appleton had the wrong class, so the template is probably causing errors across the site. Inductive conclusions are never certain, only more or less likely. The weak points are too few examples and examples that aren't typical. Thirty labels chosen at random are good evidence. Thirty labels chosen because they looked wrong are not.

Most workplace problem solving is inductive. That's fine, as long as the team remembers that its conclusions are strong or weak, not proven, and stays open to new evidence.

Common Reasoning Fallacies

A fallacy is a flaw in the logic of an argument. Fallacies can sound convincing, which is exactly what makes them dangerous in a meeting.

Fallacy	What It Sounds Like	The Flaw
Hasty generalization	"We tried remote meetings once and they didn't work."	One example isn't enough to draw a conclusion
False cause	"Errors went up after the new hire started, so it's her fault."	Happening after something doesn't mean caused by it
Either-or thinking	"We either replace the whole system or live with the errors."	Ignores the other options in between
Appeal to authority	"The vice president likes it, so it must be right."	Rank isn't evidence
Bandwagon	"Everyone else is doing it this way."	Popularity isn't evidence either
Attacking the person	"Of course Renata thinks that. She's from Duluth."	Dismisses the idea by attacking the speaker
Straw man	"So you want us to stop checking returns completely?"	Argues against a twisted version of what was said

Protecting Your Team From Traps

Assign someone to look for disconfirming evidence. Ask one person to search specifically for facts that cut against the favored option.

Estimate before you share. When the team needs a number, have everyone write down their own estimate before anyone speaks. It prevents the first number from anchoring the rest.

Ask the fresh-start question. If we were starting from scratch today, knowing what we know now, would we choose this? It cuts through sunk-cost thinking.

Name the trap, not the person. "I wonder if we're anchoring on that first number" lands much better than "you're biased."

Try This at Work

1. Before your next estimate discussion, have everyone write a number privately first. Compare the spread.
2. Pick one ongoing project and ask the fresh-start question about it.

Discussion Questions for Your Team

1. Which of the four mental traps do you fall into most often? What usually triggers it?
2. Which fallacy from the table have you heard in a meeting recently? How did the group respond?
3. How can a team point out a reasoning trap without embarrassing the person who fell into it?

Module 34: Divergent Thinking and Brainstorming That Works

Good decisions need two different kinds of thinking. Psychologist J. P. Guilford called them divergent and convergent thinking. Divergent thinking goes wide. It generates many possible ideas without judging them. Convergent thinking narrows. It evaluates the options and picks the best one.

Teams get into trouble when they try to do both at once. The moment someone says an idea won't work, people stop offering new ones. The fix is simple: go wide first, then narrow, and keep the two steps separate.

Where Brainstorming Came From, and What Research Found

Advertising executive Alex Osborn popularized brainstorming in the 1950s. His rules are still the standard: hold off on judging ideas, go for quantity, welcome unusual ideas, and build on each other's ideas.

Researchers later tested whether group brainstorming really produces more ideas than people working alone. In 1987, Michael Diehl and Wolfgang Stroebe compared the two. People who came up with ideas on their own and then pooled them produced more ideas than the same number of people brainstorming out loud together. The main reason was simple. In a group, only one person can talk at a time. While people wait their turn, they forget ideas or decide not to share them.

The practical lesson is not to give up on group brainstorming. It's to combine quiet individual thinking with group sharing, so you get the best of both.

Three Ways to Brainstorm

Method	How It Works	Best When	Watch Out For
Round robin	Members take turns in order, offering one idea each turn, or passing	You need every voice heard, including quiet members	People feel pressure when it's their turn, and the pace can feel slow
Popcorn	Anyone calls out ideas whenever they come, in no set order	The group is comfortable together and energy is high	Louder members can dominate while quieter ones hold back
Brainwriting	Everyone writes ideas silently first, then shares them	The topic is sensitive or the group has strong personalities	Less building on each other's ideas unless you add a sharing round

Running a Brainstorm, Step by Step

1. Frame the question clearly. Questions that start with "How might we" work well, such as how might we make sure every return gets the right freight class.
2. Give everyone five minutes to write ideas silently.
3. Share ideas round robin, one per person per turn, until the lists run out.
4. Switch to popcorn to build on and combine ideas.

5. Capture every idea where everyone can see it, word for word, without judging.
6. Group similar ideas together, and stop when the time limit is reached.

Organizing Ideas Into Groups

A long list of ideas is hard to work with. Japanese anthropologist Jiro Kawakita developed a simple way to organize one, now often called an affinity diagram. It works best with ideas written on sticky notes or cards.

1. Put all the ideas where everyone can see them.
2. Without talking, members move ideas that seem related into clusters. Anyone can move any note.
3. When the movement stops, discuss the clusters and give each one a short name.
4. Look at the clusters as a whole. They often reveal a few big themes hiding inside a long list.

Back at Cedarview

Priya ran the brainstorm exactly that way. After five minutes of silent writing and three rounds of round robin, the team had twenty-six ideas on the whiteboard. Some were familiar, like replacing the template. Others were new. Owen suggested a simple chart at the dock showing common freight classes with photos. Farah suggested that the label screen display the package weight right next to the freight class, so mismatches would be obvious. Neither idea would have come up in the argument the team had been having a week earlier.

Try This at Work

1. Run your next brainstorm with five minutes of silent writing before anyone speaks. Count the ideas.
2. Rewrite a problem your team faces as a “How might we” question.

Discussion Questions for Your Team

1. Which brainstorming method does your team usually use? Who gets heard, and who doesn’t?
2. Why is it so hard to hold off on judging ideas? What would help your team do it?
3. When has an unusual idea turned out to be the best one?

Module 35: Convergent Thinking and Reaching Consensus

After going wide, a team has to narrow down. That means sorting through the ideas and agreeing on a decision the team will actually support. Chapter 2 introduced consensus as one way to make decisions. This module shows how to reach it without endless debate.

What Consensus Is and Isn’t

Consensus doesn’t mean everyone’s first choice wins, and it doesn’t mean everyone is thrilled. It means every member can honestly say: I understand the decision, I had a real chance to be heard, and I can live with it and support it. That’s different from a majority vote, where nearly half the team can walk away unhappy. It’s also different from unanimous enthusiasm, which is rare and usually not worth waiting for.

Narrow the List First

Before voting, clean up the list. Clarify any idea that isn't clear. Combine ideas that are really the same idea. Remove any idea that fails a must-have requirement, such as being illegal, unsafe, or far beyond the budget. This step alone often cuts a long list in half.

Reaching Consensus by Vote

Multivoting is a structured way to narrow a list quickly and fairly. It gives everyone an equal voice, and it shows where the group's energy already is.

1. Number the ideas on the cleaned-up list.
2. Give each person a set number of votes. A common rule of thumb is about one vote for every three ideas on the list.
3. Everyone votes at the same time, by marking the list or writing numbers privately. Members can spread their votes or put several on one idea.
4. Keep the ideas with the most votes and set the rest aside.
5. Repeat with the shorter list until three to five finalists remain.
6. Discuss the finalists in depth, then check for consensus.

Multivoting narrows the options. It doesn't make the final decision. The final choice comes from discussing the finalists and checking whether everyone can support one of them.

When Voices Are Uneven

Sometimes a group has a strong personality, a big difference in rank, or a history of tension. In those cases, the nominal group technique adds extra structure. It was developed by Andre Delbecq and Andrew Van de Ven in the late 1960s, and it combines several ideas from this chapter.

1. Members write ideas silently and on their own.
2. Ideas are shared round robin, one at a time, and recorded without discussion.
3. The group discusses each idea only to make sure everyone understands it.
4. Members rank or vote privately, and the results are added up.

Because the ideas come from everyone equally and the voting is private, rank and personality carry much less weight.

Checking for Consensus

A quick way to check is called fist to five. Everyone holds up a hand at the same time, showing how strongly they support the proposal.

Fingers	What It Means
Five	Strong support. I'll help lead it.
Four	Good support.
Three	I can live with it and support it.
Two	I have concerns I'd like to discuss.

Fingers	What It Means
One	I have serious concerns. We need more discussion.
Fist	I can't support this. We need a different option.

Guidelines for Effective Decisions

When everyone shows three or more, you have consensus. Anyone showing two or fewer gets to explain their concern, and the team decides whether to adjust the proposal. A few more guidelines keep decisions sound.

1. Agree on how the decision will be made before the discussion starts.
2. Base the decision on the evidence and on criteria the team agreed to in advance.
3. Hear every view before anyone argues for a final answer.
4. Treat a strong minority objection as information, not an obstacle.
5. State the decision clearly and write it down, including who will do what.
6. Set a time to review whether the decision is working.

Back at Cedarview

The team cleaned up its twenty-six ideas, combined duplicates, and ended up with fifteen. Each person got five votes. After two rounds, three finalists remained. The first was to reconfigure the old template so staff had to enter the freight class by hand, with the package weight shown right beside it. The second was a one-page freight class guide with photos at every returns dock. The third was a billing check that flagged mismatches before invoices went out.

The discussion that followed produced a combined plan: all three, in that order, with the full template replacement moved to IT's normal upgrade schedule. On fist to five, everyone showed three or more except Willa, who held up two. Her concern was simple. Many Appleton dock workers had never had to pick a freight class themselves. A manual entry field wouldn't help if people didn't know what to enter.

Try This at Work

1. Use multivoting the next time your team has a long list of options.
2. End your next decision discussion with fist to five. Give anyone at two or below the floor first.

Discussion Questions for Your Team

1. How does your team usually make decisions when there are many options? Does it work well?
2. What is the difference between a decision you can live with and one you are excited about? Is the first enough?
3. When has a single objection improved a team's decision?

Module 36: Avoiding Groupthink and Making Decisions That Hold

In 1972, psychologist Irving Janis made the term groupthink famous. He studied major policy disasters, including the failed Bay of Pigs invasion of 1961, and found a common pattern. Groups of capable people made poor decisions because their desire for agreement overpowered their judgment. Doubts went unspoken. Warnings got explained away. Everyone assumed everyone else agreed.

Warning Signs of Groupthink

Warning Sign	What It Looks Like
Pressure on doubters	People who raise concerns are told they aren't being team players
Self-censoring	Members keep their doubts to themselves to avoid rocking the boat
The illusion of agreement	Silence is taken as a yes
Explaining away warnings	Evidence against the plan is dismissed without real discussion
Overconfidence	The team believes the plan can't fail
Gatekeeping	Someone keeps bad news or outside opinions from reaching the group

Why Close Teams Are at Risk

Here is the uncomfortable part. The very things Chapter 3 encouraged, trust, shared identity, and a close-knit team, can make groupthink more likely. People who like each other don't want to spoil the mood. The risk rises further when a leader or sponsor states a preference early, because people naturally line up behind power. That is exactly what nearly happened when Dana mentioned the clean slate.

Preventing Groupthink

Leaders speak last. When the most senior person states a view first, the discussion is over before it starts. Ask leaders and sponsors to hold their opinions until others have spoken.

Welcome real disagreement. Psychologist Charlan Nemeth found that genuine dissent, from someone who truly disagrees, sparks better thinking than an assigned devil's advocate who is only playing a part. Teams can use a devil's advocate, but the bigger win is making it safe for real doubters to speak.

Bring in outside eyes. Ask someone outside the team to poke holes in the plan.

Hold a second-chance meeting. For big decisions, sleep on it. Meet again and ask whether anyone has new doubts.

Run a pre-mortem. Imagine the plan has already failed, and figure out why.

The Pre-Mortem

A post-mortem looks back at why a project failed. Researcher Gary Klein proposed flipping it around. In a 2007 Harvard Business Review article, he described the pre-mortem: before the team commits, imagine the project has failed and work backward to explain how. Because the failure is imagined as already certain, people feel freer to name risks they might otherwise keep to themselves.

1. Describe the plan the team has chosen.
2. Say: Imagine it's six months from now, and this plan has failed. What went wrong?
3. Give everyone a few minutes to write down every reason they can think of, silently.
4. Go around the room and collect one reason at a time until all are shared.
5. Pick the most serious risks and change the plan to prevent them.

Disagree and Commit

Once a decision has been made through a fair process, everyone supports it, including the people who argued for something else. That doesn't mean pretending to agree. It means not working quietly against the decision. If new evidence shows up later, bring it back to the team. A decision that people only follow when they agreed with it isn't really a team decision.

Back at Cedarview

Priya had caught the first near miss. After Dana's clean slate comment, she asked Dana, privately, to hold her opinion until the team had worked through the options. Dana agreed and apologized. "I didn't realize how fast everyone would fall in line," she said.

The second test came after the fist-to-five vote. Priya took Willa's concern seriously and ran a pre-mortem. "It's six months from now, and Appleton's errors are still high. Why?" The answers filled the whiteboard. Dock staff didn't know how to choose a freight class. The manual entry slowed them down on busy days, so they guessed. New hires started without any training at all. Nobody was checking whether the change had worked.

The plan changed that afternoon. The team added a short training program for returns dock staff, to be tested at one warehouse before it went to both. Willa, who had held up two fingers an hour earlier, volunteered to help design it.

Try This at Work

1. Run a fifteen-minute pre-mortem on your team's next big decision before you commit to it.
2. In your next meeting, ask the most senior person present to share their view last.

Discussion Questions for Your Team

1. Which groupthink warning sign have you seen on a team? What happened?
2. Why is genuine dissent more useful than an assigned devil's advocate? How can your team make it safer?
3. What would a pre-mortem reveal about a plan your team is working on right now?

Chapter Summary

The team presented its plan to Dana two weeks later. It had four parts. Reconfigure the template with the package weight shown beside the freight class. Put a photo guide at every returns dock. Add a billing check. And train dock staff, starting with a test at one warehouse. Dana approved it on the spot. Then she added something Priya didn't expect. The fix now touched IT, billing, two warehouses, and a new training program. "This isn't a side project anymore," Dana said. "I want it set up as a real improvement project, with a charter and the whole process behind it."

Here are the most important ideas from this chapter to carry forward:

1. Critical thinking means asking how we know, separating facts from opinions and assumptions, considering other explanations, and changing your mind when the evidence changes.

2. Break arguments into claim, reasons, evidence, and assumptions. Judge evidence by its strength, and remember that things happening together doesn't prove one caused the other.

3. Everyone falls into mental traps like confirmation bias, anchoring, availability, and sunk cost. Name the trap, not the person, and build habits that catch them.

4. Go wide before you narrow. Combine silent idea writing with round robin and popcorn brainstorming, then use multivoting and fist to five to reach consensus.

5. Close teams are at risk of groupthink. Have leaders speak last, welcome genuine dissent, and run a pre-mortem before committing to a big decision.

Process Excellence and Improvement Projects

Leading Change, Chartering a Team, Running Meetings, and the 7-Step Method

Opening Story: Eighteen Months of Green Numbers

Priya's first reaction to the word charter was a groan. It sounded like paperwork. "We already know what to do," she told Renata. "Why do we need a document to say it?"

Renata had led two improvement projects in Duluth before the facility was downsized. "Because the fix touches five departments," she said, "and every one of them is going to ask what you're doing, who said you could, and when you'll be done. The charter answers all three before they ask."

That same week, Dana showed Priya something that changed how she saw the whole project. For eighteen months, every warehouse had been judged on one main number: returns processed per shift. Appleton and Eau Claire had two of the best scores in the company. Their managers had been praised for it. The auto-filling template was part of why they were so fast. Nobody had to stop and think about freight class.

"We rewarded them for speed," Dana said. "We never asked whether the returns were right. The scoreboard was green the whole time the problem was growing."

Priya realized the template was only half the story. The other half was how Cedarview managed its work.

Module 37: Process Excellence Versus Management by Results

There are two broad ways to run an organization's work. One focuses mainly on results: set targets, measure whether people hit them, and reward or correct them based on the numbers. The other focuses on the processes that produce those results: understand how the work actually gets done, and keep improving it. Both care about results. They differ in where they look to get them.

Management by Results

Management by results is common and appealing. It's simple, it's easy to measure, and it gives everyone a clear target. The trouble comes from its side effects when targets are the only thing that matters.

People hit the number instead of doing the job. When the target is returns per shift, speed wins, even when accuracy suffers. Economists call this Goodhart's law, often summed up this way: when a measure becomes a target, it stops being a good measure.

Problems get hidden. If missing a target means blame, people learn to keep problems quiet until they can't be hidden anymore.

Short-term fixes win. A quick patch that saves this month's number beats a real fix that takes a quarter.

Departments work against each other. Each group protects its own numbers, even when that hurts the organization as a whole.

Individuals get blamed for system problems. When results slip, the question becomes who missed the target, not what about the process caused it.

W. Edwards Deming, whose ideas appeared in Chapter 5, was one of the sharpest critics of managing mainly by numerical targets. He argued that targets without a better process behind them mostly produce pressure, fear, and creative accounting.

Process Excellence

Process excellence is an approach that improves results by improving the processes that produce them. It doesn't ignore numbers. It uses them to understand and improve the work instead of just to judge people. Its key elements are these.

Focus on the customer. Define quality by what the customer actually needs.

Understand the process. Know how the work really flows, step by step.

Manage with data. Measure the process to learn from it, not just to score it.

Fix root causes. Solve problems at the source so they stay solved.

Involve the people who do the work. They know the process best and have to live with any change.

Keep improving. Treat every process as something that can always get better.

The Two Approaches Side by Side

Question	Management by Results	Process Excellence
What gets the attention?	Hitting the target	Improving the process that produces the result
What is data used for?	Judging performance	Understanding and improving the work
When a problem appears	Find who missed the target	Find what in the process allowed it
Role of frontline workers	Carry out the plan and hit the numbers	Help find problems and design fixes
Time horizon	This month or this quarter	Lasting improvement

Who Contributes What

Process excellence depends on two partners. The organization sets the conditions. The project team does the improvement work. Neither can succeed without the other.

What the Organization Contributes	What the Project Team Contributes
A strategy that makes improvement a priority	Knowledge of how the process really works
A sponsor with authority and resources	Data on how the process is performing
Time for people to work on improvement	Analysis that finds the root causes
Measures and rewards that support quality, not just speed	Solutions designed and tested with the people who do the work
Help removing barriers between departments	A plan to make the improvement stick

Evaluating a Process Excellence Project

When you look back at any improvement project, your own or someone else's, these questions show whether it truly followed a process excellence approach.

1. Was the problem defined with data, and was the root cause confirmed?
2. What did the organization contribute? Did its strategy, measures, and support help or hurt the team?
3. Did the team's roles work? Which role was strongest, and which one could have been done better?
4. Were results measured the same way before and after the change?
5. Did the improvement last, or did the old way creep back?

Try This at Work

1. List the main numbers your work is judged on. For each one, ask whether it could be hit in a way that hurts quality.
2. Pick one recent improvement project at your workplace and answer the five evaluation questions about it.

Discussion Questions for Your Team

1. Where have you seen a target produce the wrong behavior? What would a better measure have been?
2. Which element of process excellence is strongest at your organization? Which is weakest?
3. What does your organization contribute to improvement work, and what does it leave entirely to teams?

Module 38: Teams as Engines of Organizational Change

Every improvement is a change, and change is where many good ideas go to die. A team can find the right root cause, design the right fix, and still fail because the people affected never accept it. Leading change is part of the job.

A Roadmap for Change

In 1995, Harvard professor John Kotter published a Harvard Business Review article on why efforts to transform organizations so often fail. He later expanded it into a book called Leading Change. His eight-step model is one of the most widely used guides to leading change. Here is what each step means for an improvement team.

Kotter's Step	What It Means for a Team
1. Create a sense of urgency	Show clearly, with data, why the change can't wait
2. Build a guiding coalition	Get respected people from affected groups on board early
3. Form a vision	Describe in plain words what things will look like after the change
4. Communicate the vision	Repeat it often, in every channel, and act consistently with it
5. Remove obstacles	Clear away the rules, systems, and habits that block the change
6. Create short-term wins	Plan early, visible successes that prove the change works
7. Build on the gains	Use early wins to take on the next piece, instead of declaring victory
8. Make it stick	Build the change into standard procedures, training, and measures

The Implementation Plan

An implementation plan turns a good solution into a change people will actually make. It has four parts.

A vision statement. One or two sentences describing what success looks like, in words anyone affected can understand.

The stakeholders and how they're affected. Who will have to work differently, and what exactly changes for them.

Likely reasons for resistance. Why each group might push back, using the causes of resistance from Chapter 3.

A plan of action. The tasks, owners, and dates that will carry the change out, using the planning grid from Chapter 4.

Writing a Vision Statement

A good vision statement is short, concrete, and about the people affected, not about the project team. Avoid jargon and vague words like excellence or world-class. Here is the one Priya's team wrote.

Every return reaches the right warehouse at the right price the first time, and every returns dock worker knows how to make that happen.

Planning for Each Stakeholder

Stakeholder	How the Change Affects Them	Likely Concern	How We'll Involve Them
Returns dock staff	Must choose the freight class by hand	Slower work and fear of mistakes	Help design the training and the photo guide
Warehouse managers	Returns per shift may dip at first	Looking bad on the scorecard	Sponsor adds accuracy to the scorecard
Billing department	New check flags mismatched returns	More work reviewing flags	Set the flag rules with billing staff
IT	Template changes at two sites	Competing priorities	Schedule the work with IT early
Customers	Fewer billing errors on returns	None, if the change works	Share results through Customer Resolutions

Back at Cedarview

When Priya shared the stakeholder table with Dana, one row stood out. Warehouse managers would resist anything that slowed returns per shift, because that number still decided their reviews. Dana agreed to add a return accuracy measure to every warehouse scorecard before the change started. It was step five of Kotter's model, removing an obstacle, and only the sponsor could do it.

Try This at Work

1. Write a two-sentence vision statement for a change your team is working on. Test it on someone outside the team.
2. Fill in a stakeholder table for the same change. Circle the concern you're least prepared for.

Discussion Questions for Your Team

1. Think of a change at work that failed. Which of Kotter's steps was skipped?
2. Why do so many change efforts declare victory too early?
3. Which stakeholder group at your workplace is usually left out of change planning?

Module 39: Chartering an Improvement Team

A charter is a short written agreement that launches an improvement project. It says what the team will do, why, who is involved, what authority and resources the team has, and how the

team will work. The sponsor approves it, and the team uses it as a guide from the first meeting to the last.

A charter prevents a long list of problems before they start: confusion about scope, arguments about authority, surprises about resources, and members who never quite agreed to the same thing.

What a Charter Includes

Section	What It Answers
Project name and purpose	What is this project, and why does it matter?
Problem statement	What gap are we closing, with numbers?
Goal and measures	What will success look like, and how will we measure it?
Scope	What is included, and what is not?
Team and roles	Who is the sponsor, coach, leader, and each member?
Authority and resources	What can the team decide on its own? What time, money, and help does it have?
Timeline and milestones	When are the key checkpoints and the finish?
Member expectations	What do members commit to about deadlines, quality of work, and response times?
Ground rules and decision methods	How will we work together and make decisions?
Sponsor approval	Who signed off, and when?

Setting Member Expectations

Most team frustration comes from unspoken expectations. One person answers messages within the hour. Another answers within the week. One person turns in rough drafts. Another expects polished work. Write the expectations into the charter so everyone agrees up front. Here are the expectations Priya's team wrote.

1. Deadlines: Finish action items by the agreed date. If you can't, tell the team at least two business days ahead.

2. Quality of work: Double-check data before sharing it, and say clearly when something is a draft.

3. Response times: Answer team messages within one business day, even if the answer is that you need more time.

4. Meetings: Read materials before the meeting and come ready to discuss them.

The Four Key Roles

Chapter 2 introduced formal team roles. Improvement projects add two more that sit partly outside the team: the sponsor and the coach.

Sponsor. A manager with the authority to approve the project, provide resources, and remove barriers. The sponsor is usually the owner of the problem.

Coach. Someone experienced in improvement methods who guides the team through the process, teaches tools, and helps with facilitation. The coach advises. The coach doesn't run the project.

Team leader. The person responsible for the team's day-to-day work: planning, running meetings, keeping tasks moving, and communicating with the sponsor.

Team members. The people who do the analysis, bring process knowledge, carry out tasks, and help design and test solutions.

Roles Before, During, and After the Project

Each role's responsibilities shift as a project moves through its phases.

Role	Before the Project	During the Project	After the Project
Sponsor	Chooses the problem, drafts the purpose, selects the leader, and approves the charter	Reviews progress, provides resources, removes barriers, and makes decisions beyond the team's authority	Accepts the results, makes sure changes are adopted, and recognizes the team
Coach	Helps shape the charter and plans how the team will be trained	Teaches tools, advises on methods, and helps the leader with meetings and conflict	Helps capture lessons learned and supports the next team
Team leader	Helps write the charter, plans the kickoff, and meets each member	Runs meetings, tracks the plan, delegates work, and reports to the sponsor	Leads the wrap-up, hands off ongoing tasks, and writes the final summary
Team members	Review the charter and clear time in their schedules	Gather data, analyze causes, complete action items, and help design and test solutions	Help train others in the new process and share what they learned

What Each Role Requires

Role	Knowledge Needed	Skills and Abilities Needed
Sponsor	The organization's strategy and how decisions get made	Influence across departments, sound judgment, and follow-through
Coach	Improvement methods and tools like those in Chapters 5, 6, and 8	Teaching, facilitation, and patience

Role	Knowledge Needed	Skills and Abilities Needed
Team leader	The project's goals and the process being improved	Planning, running meetings, delegating, and communicating
Team members	Their own part of the process	Gathering data, analysis, teamwork, and willingness to try new approaches

Joint Review Meetings

A joint review is a regular meeting where the team and the sponsor review the project together. The team reports the work it has done since the last review, the decisions it needs from the sponsor, and any risks or obstacles. The sponsor gives feedback, makes decisions, and clears barriers. Notes from each joint review record the work performed, the decisions made, and the next steps, so the project's history is always in one place.

Back at Cedarview

Priya's charter fit on two pages. The sponsor was Dana. Renata served as coach, drawing on her experience in Duluth. Priya was team leader. Members were Willa, Owen, Farah, Marcus two days a week, and Luis, a returns dock lead from Eau Claire, who was added because the change would land on his dock too.

The goal was to cut freight class and routing errors on returns at Appleton and Eau Claire by three quarters within four months, measured the same way as the original checksheet. The scope included the template, the dock guide, the billing check, and dock staff training. It excluded the full template replacement, which stayed on IT's normal schedule. Joint reviews with Dana were set for every other Thursday. Dana signed it the day Priya sent it.

Try This at Work

1. Draft a one-page charter for a project you're working on, using the sections in the table. Notice which sections you can't fill in yet.

2. Write three member expectations for your team, covering deadlines, quality of work, and response times.

Discussion Questions for Your Team

1. Which charter section would have prevented the most trouble on a past project of yours?
2. Have you worked on a project without a clear sponsor? What happened?
3. What is the difference between a coach and a team leader? Why keep the roles separate?

Module 40: Planning and Running Productive Meetings

Meetings are one of the most expensive tools a team uses. Add up the salaries of everyone in the room for an hour and the cost gets real quickly. Good meetings are worth it. They are where teams decide, solve problems, plan, and build trust. Bad meetings waste time and drain energy. The difference is almost entirely in how they are planned and run.

Should This Be a Meeting?

Meet when the group needs to decide something, solve a problem together, plan work that depends on several people, or build relationships. Don't meet just to share information that

could be sent in writing. If the whole purpose of a meeting is updates, try a written update and save the meeting time for discussion.

Four Guidelines for Good Meetings

Have a clear purpose and an agenda. Every meeting should have a stated purpose, and every agenda item should say whether it is for information, discussion, or decision.

Bring the right people and assign roles. Invite the people needed to accomplish the purpose, and no more. Assign a facilitator, a recorder, and a timekeeper, as described in Chapter 2.

Follow the ground rules and respect the clock. Start on time, end on time, and use the team's ground rules to keep discussion focused and fair.

End with decisions, actions, and a quick evaluation. Close by reviewing what was decided, who will do what by when, and what could make the next meeting better.

Building an Agenda

A good agenda does more than list topics. For each item, it shows the purpose, who leads it, and how much time it gets. Send it at least a day ahead, with any materials people need to read, so everyone comes prepared.

A Sample Agenda for a Team's First Meeting

Time	Agenda Item	Purpose	Lead
10 minutes	Welcome and introductions	Get acquainted and share what each person brings	Team leader
10 minutes	Why this project matters	Hear the purpose and urgency from the sponsor	Sponsor
15 minutes	Review the draft charter	Discuss the goal, scope, and member expectations	Team leader
10 minutes	Assign meeting roles	Choose the facilitator, recorder, and timekeeper, and agree on how they rotate	Team leader
10 minutes	Agree on ground rules and decision methods	Decide how the team will work and decide	Coach
10 minutes	First action items and next meeting	Assign first tasks and set the meeting schedule	Team leader
5 minutes	Evaluate the meeting	What worked, and what should change next time	Facilitator

Guidelines for Effective Discussion

The facilitator's job is to help the group think well together. A few techniques do most of the work.

Technique	What the Facilitator Does
Keep one topic at a time	Gently steers the group back when discussion drifts
Bring in quiet voices	Invites people who haven't spoken, by name and without pressure
Summarize often	Restates where the group is before moving on
Use a parking lot	Writes off-topic but important items on a separate list for later
Check for agreement	Asks whether the group is ready to decide, using fist to five from Chapter 6
Watch the time	Warns the group when an item is running over, and asks whether to extend or move on

Online and Hybrid Meetings

Online meetings follow the same four guidelines, with a few additions. Test the technology before the meeting, not during it. Share the agenda and materials on screen so everyone looks at the same thing. Ask people to keep cameras on for discussions when they can, since faces help people read each other. Use the chat or a raised-hand feature so people can signal that they want to speak. And keep online meetings shorter than in-person ones, because attention fades faster on a screen.

Hybrid meetings, with some people in the room and some online, are the hardest to run well. The people in the room tend to forget the people on the screen. Name someone in the room to watch the chat and speak up for remote members, and give remote members the first turn on each topic.

Solving Common Meeting Problems

Problem	Try This
Meetings start late	Start on time every time, even with people missing
One person dominates	Use round robin turns, and thank them before inviting others in
Discussion wanders	Point to the agenda and use the parking lot
The same issue keeps coming back	Check the minutes, restate the earlier decision, and ask whether anything new has changed
No decisions get made	Label each agenda item as information, discussion, or decision
Remote members fade out	Give them the first turn on each topic, as described in Chapter 2

Evaluating Your Meetings

The fastest way to improve meetings is to spend two minutes at the end asking what worked and what should change. For a fuller look, each member can rate their own meeting skills and those of their teammates using a checklist like this one.

Meeting Skill	Rarely	Sometimes	Usually
Came prepared, with materials read			
Arrived and started on time			
Listened without interrupting			
Stayed on the topic at hand			
Shared ideas and built on the ideas of others			
Disagreed respectfully and focused on the issue			
Helped the group reach decisions			
Completed action items on time			

Back at Cedarview

Priya's first meeting with the chartered team followed the sample agenda almost exactly. Dana opened with ten minutes on why the project mattered, then left. Renata ran the ground rules discussion, which went faster than anyone expected, since most of the team had lived through the Cold Chain Crew's lessons. Luis, the newest member, was named the first recorder, which gave him a clear job in a room full of people who already knew each other.

At the end of the second week, Renata asked every member to fill out the meeting skills checklist for themselves and for each teammate. Marcus rated himself usually on everything. His teammates rated him sometimes on completing action items on time. He didn't argue. He started putting his action items in his calendar the same day.

Try This at Work

1. For your next meeting, label every agenda item as information, discussion, or decision.
2. End your next three meetings with a two-minute evaluation. Change one thing each time.

Discussion Questions for Your Team

1. Which of your regular meetings could be replaced by a written update?
2. Which of the four guidelines does your team follow best? Which one does it skip most?
3. Using the checklist, which meeting skill is your personal strength? Which needs work?

Module 41: Documenting Meetings and Creating Action Plans

A meeting that isn't written down didn't really happen. Within a week, people remember decisions differently, forget who agreed to do what, and start reopening questions that were already settled. Good documentation prevents all of that.

What Good Minutes Include

Minutes are not a transcript. They are a short record of what matters.

The basics. Date, time, who attended, and who was absent.

Decisions. Each decision, stated clearly enough that someone who missed the meeting would understand it.

Action items. What will be done, who will do it, and by when.

Open issues. Questions still unresolved and items waiting in the parking lot.

Next meeting. When it is and what it will cover.

The recorder should share the minutes within one business day and store them in one shared place. The next meeting should start by reviewing the action items from the last one.

Sample Minutes

Here is part of the minutes from the third meeting of Priya's improvement team.

Agenda Item	Summary	Decision	Action, Owner, and Due Date
Template change	Renata confirmed IT can reconfigure the template at both sites	Show package weight beside the freight class field	Send the design to IT: Renata, by Friday
Photo guide for the dock	Owen shared a draft with eight common freight classes	Add examples of repacked returns	Revise the draft: Owen and Luis, by next Wednesday
Training test site	Discussed Appleton and Eau Claire as the first test	Test at Eau Claire first, since it is smaller	Draft the training plan: Willa and Luis, in two weeks
Parking lot	Farah raised whether other return types have similar errors	Hold for the next joint review	Add to the joint review agenda: Priya

Writing Action Items That Get Done

Vague action items don't get done. "Look into the training" can mean anything. A strong action item has four parts: a clear action that starts with a verb, one owner, a due date, and a definition of done. "Willa and Luis will draft a one-page training plan for Eau Claire dock staff and share it with the team by the twenty-second" leaves no room for confusion.

Give each action item one owner, even when several people help. When everyone owns a task, nobody does.

Concluding a Meeting Well

1. Summarize the decisions made.
2. Read back every action item, with its owner and due date.

3. Agree on the main topics for the next meeting.
4. Take two minutes to evaluate the meeting.
5. End on time, or early if the work is done.

Try This at Work

1. Review the notes from your team's last meeting. Rewrite any vague action item so it has an action, an owner, a due date, and a definition of done.
2. Start your next meeting by reviewing the action items from the previous one.

Discussion Questions for Your Team

1. Has your team ever reopened a decision because nobody wrote it down? What did it cost?
2. Why do action items with several owners so often fall through the cracks?
3. Where does your team keep its meeting records? Could a new member find them easily?

Module 42: The Process Approach and the 7-Step Method

Chapter 5 made the case for blaming the process, not the person. The process approach takes that idea one step further. It treats every repeated piece of work as a system, with inputs coming in, steps that transform them, outputs going out, and feedback that shows how well it worked. When something goes wrong, the process approach asks what about the system made the problem likely. Chapter 8 shows how to draw a system like this on paper.

The 7-Step Method

The 7-Step Method gives a team a clear, repeatable path through a problem. It comes from the quality improvement tradition associated with Brian Joiner and his colleagues, and it was spread widely through Peter Scholtes's guide The Team Handbook. The steps are simple. The discipline is in not skipping any of them.

Step	What the Team Does	Tools in This Book
1. Define the project	Choose the problem and state it clearly, with data, as a gap to close	Problem statement, is and is not table, charter
2. Study the current situation	Gather facts on how the process performs today	Go and see, checksheet, Pareto chart, process map
3. Analyze the causes	Find and confirm the root cause	Five Whys, fishbone diagram, data checks
4. Develop and test a solution	Generate options, choose one, and try it on a small scale	Brainstorming, multivoting, decision matrix, pre-mortem, PDCA
5. Check the results	Measure the process again the same way, and compare	Checksheet, before and after comparison

Step	What the Team Does	Tools in This Book
6. Standardize the improvement	Build the change into normal work so it lasts	Written procedures, training, updated measures
7. Plan for the future	Capture lessons and decide what to improve next	After-action review, Pareto chart of remaining problems

Why the Structure Matters

The most commonly skipped step is the second one. Under pressure, teams jump from naming a problem straight to fixing it. That means guessing at the cause, and guesses usually treat symptoms. Steps five and six get skipped too. Teams celebrate the fix, never check whether it worked, and watch the old way quietly return. The 7-Step Method protects against all three shortcuts.

Steps four through six follow a cycle called Plan, Do, Check, Act. Chapter 8 covers it in detail, along with the tools for mapping a process and choosing among solutions.

Back at Cedarview

At the first joint review, Priya put the seven steps on a single slide and marked where the team stood. Steps one through three were done, and the charter, checksheet, Pareto chart, and Five Whys proved it. Step four was half done. The team had chosen its solution but hadn't tested it. Steps five through seven were still ahead.

Dana studied the slide for a moment. "This is the first time I've seen a project show me what it hasn't done yet," she said. "Keep going."

Try This at Work

1. Pick a problem your team solved recently. Mark which of the seven steps it completed and which it skipped.

2. For a current problem, write down which step you're on and what evidence shows the earlier steps are done.

Discussion Questions for Your Team

1. Which step do teams at your workplace skip most often? What does it cost?

2. Think of a repeated piece of work you do. What are its inputs, steps, outputs, and feedback?

3. Why might a sponsor value seeing what a project hasn't done yet?

Chapter Summary

By the end of the month, Priya's team had a signed charter, a vision statement, a stakeholder plan, and a new accuracy measure on every warehouse scorecard. Its meetings started on time, ended with clear action items, and closed with a two-minute evaluation that Marcus had started calling the best part of the meeting. The team had chosen Eau Claire as the place to test its fix. Now it had to prove the fix worked, on a real dock, with real returns, before anyone asked Appleton to change a thing.

Here are the most important ideas from this chapter to carry forward:

1. Management by results can produce hidden problems, gamed numbers, and blame. Process excellence improves results by improving the processes that produce them, with the organization and the project team each doing their part.

2. Teams lead change. Use Kotter's steps as a roadmap, and build an implementation plan with a vision statement, stakeholder impacts, likely resistance, and a plan of action.

3. A charter launches an improvement project with a clear purpose, scope, goal, roles, authority, and member expectations. The sponsor, coach, leader, and members each have distinct responsibilities before, during, and after the project.

4. Good meetings have a clear purpose and agenda, the right people and roles, respect for the clock and ground rules, and a close with decisions, actions, and evaluation. Good minutes record decisions and specific action items.

5. The 7-Step Method guides a team from defining a problem to planning what comes next. Its value comes from not skipping steps, especially studying the current situation and checking results.

Tools That Improve Processes

Process Maps, Decision Tools, and the PDCA Cycle

Opening Story: One Dock, Four Weeks

The Eau Claire test was set to start in three weeks. Luis was nervous. His dock would be the first to change, and if the change slowed everything down, his crew would be the ones feeling it on a busy Monday.

Before the test could start, Priya needed something the team had been putting off. Nobody had ever drawn Cedarview's return process from start to finish. Each person knew their own part. Marcus had been working on the map since week four. When he finally rolled it out across the project room table, it ran nearly six feet long.

The team leaned over it for a long time. Then Farah put her finger on a spot near the far end. "Here," she said. "This is the first time anyone checks the freight class. It's at billing, three to six weeks after the return came in. By then, nobody on the dock remembers the shipment."

The template had been the root cause. The map showed why nobody had caught it for so long. The process had no feedback loop. The people making the mistake never heard about it.

Module 43: Seeing Work as a System

Chapter 7 introduced the process approach, the habit of treating repeated work as a system. This module shows how to describe a system simply enough that everyone on a team can see it the same way.

The Four Parts of a System

Every process, from answering a customer call to building a truck engine, has four basic parts.

Part	What It Means	Cedarview Returns Example
Inputs	What goes into the process: materials, information, and requests	Returned freight, customer return forms, and the original shipment record
Process	The steps that turn inputs into outputs	Pickup, labeling, dock receiving, routing, restocking, and billing
Outputs	What the process produces	Freight back in the right warehouse and an accurate invoice or credit
Feedback	Information about the outputs that flows back to improve the process	Billing disputes and customer complaints

A Wider View: Suppliers and Customers

Many improvement teams stretch the four parts into five, using a tool called a SIPOC, which stands for suppliers, inputs, process, outputs, and customers. Adding who supplies the inputs and who receives the outputs helps a team see everyone who has a stake in the process.

Suppliers	Inputs	Process	Outputs	Customers
Customers returning freight	Returned freight and return forms	Pickup and labeling	A labeled return on its way	The receiving warehouse
Customer Resolutions	Approved return orders	Routing and receiving	Freight restocked in a warehouse	Warehouse inventory staff
IT	The label template and routing system	Billing	An invoice or credit	The customer and the finance department

Why Feedback Matters Most

Feedback is how a system learns. When feedback is fast and reaches the people doing the work, mistakes get corrected quickly. When feedback is slow, or goes to the wrong people, the same mistakes repeat for months.

Cedarview's return process had feedback, but it arrived weeks late and went to billing clerks and customer service, not to the dock staff who chose the freight class. From the dock's point of view, every return looked fine. The system was designed in a way that kept the people closest to the problem from ever learning about it.

When you study any process, ask three questions about feedback. Who finds out when something goes wrong? How long does it take? Does the information ever reach the people who could prevent it next time?

Drawing a System Diagram

A system diagram is a simple picture of the four parts. Draw inputs as boxes on the left, the process as a box or series of boxes in the middle, and outputs as boxes on the right. Connect them with arrows showing the flow from left to right. Then draw the feedback loop as an arrow that runs from the outputs back to the start of the process. If the feedback arrow is long, slow, or missing, you have probably found one of the system's weak spots.

You can draw a system diagram on paper, on a whiteboard, with the shape tools in Microsoft Word, or in a diagramming program like Microsoft Visio.

Try This at Work

1. Pick a process you work in every day. List its inputs, main steps, outputs, and feedback.
2. Draw the feedback loop. Mark how long it takes and who receives the information.

Discussion Questions for Your Team

1. Which process at your workplace has the slowest feedback? What problems does that cause?

2. Who finds out first when your team makes a mistake? Is it the person who could fix it?
3. What would it take to shorten one feedback loop in your work?

Module 44: Flowcharts and Process Maps

A flowchart shows the steps of a process in order, using standard shapes connected by arrows. A process map is a flowchart that also shows who does each step. Both turn a process that lives in people's heads into something everyone can see, question, and improve.

Standard Flowchart Symbols

Symbol	Shape	What It Means
Start or end	Oval	Where the process begins or finishes
Step	Rectangle	An action or task
Decision	Diamond	A yes or no question, with a separate arrow for each answer
Input or output	Slanted box	Information or material entering or leaving the process
Document	Rectangle with a wavy bottom edge	A form, report, or printed record
Flow	Arrow	The direction the process moves

How to Read a Flowchart

Start at the oval marked start and follow the arrows. At each rectangle, ask what happens. At each diamond, follow each answer separately to see where it leads. As you read, look for five things.

Inputs. What comes into the process, and from where?

Processes. What steps transform the inputs?

Outputs. What leaves the process, and who receives it?

Decision points. Where does the path split, and what decides which way it goes?

Feedback. Where does an arrow loop back to an earlier step? Loops show where the process checks itself, or where work has to be redone.

A Worked Example: Getting Cash From an ATM With a Credit Card

An ATM transaction is a familiar process with clear inputs, steps, decisions, and outputs. Here it is written as a flowchart would show it, step by step. Using a credit card at an ATM is called a cash advance. It borrows against the card's credit limit.

Step	Symbol	What Happens
1	Oval	Start: the customer arrives at the ATM
2	Slanted box	Input: the customer inserts the credit card

Step	Symbol	What Happens
3	Slanted box	Input: the customer enters the PIN
4	Diamond	Is the PIN correct? If no, go to step 5. If yes, go to step 6.
5	Diamond	Has the PIN been entered wrong too many times? If yes, the card is kept, go to step 13. If no, return to step 3.
6	Rectangle	The customer chooses cash advance from the credit account
7	Slanted box	Input: the customer enters the amount
8	Diamond	Is the amount within the available credit and the machine's limit? If no, show a message and return to step 7. If yes, go to step 9.
9	Rectangle	The ATM dispenses the cash
10	Document	Output: the ATM prints a receipt showing the amount and any fee
11	Diamond	Does the customer want another transaction? If yes, return to step 6. If no, go to step 12.
12	Rectangle	The ATM returns the card
13	Oval	End

What the ATM Flowchart Shows

Read it with the five questions. The inputs are the card, the PIN, and the amount. The processes are choosing the account, dispensing the cash, and returning the card. The outputs are cash, a receipt, and the card. The decision points are the PIN check, the credit check, and the choice of another transaction. The feedback loops are the arrows back to step 3, step 7, and step 6, where the process either corrects an error or repeats.

Process Maps Add Who

A process map adds a column or lane for each person, role, or department, and places each step in the lane of whoever does it. Every time the flow crosses from one lane to another, work changes hands. Hand-offs are where delays, errors, and lost information most often happen.

Here is a condensed version of the map Marcus built of Cedarview's return process, as it worked before the fix.

Step	Who Does It	What Happens	Problem Spot
1	Customer	Requests a return and repacks the freight	Packaging often differs from the original shipment
2	Customer Resolutions	Approves the return and creates a return order	
3	Driver	Picks up the return	Paperwork sometimes missing

Step	Who Does It	What Happens	Problem Spot
4	Returns dock	Prints a return label from the template	Template fills in the old freight class automatically
5	Routing system	Sends the freight to a warehouse based on its class	Wrong class can mean wrong warehouse
6	Receiving warehouse	Receives and restocks the freight	Nobody checks the freight class
7	Billing	Bills the customer for the return shipment	First place the class is compared to the freight, weeks later
8	Customer Resolutions	Handles disputes and issues credits	Feedback never reaches the dock

Building a Process Map

1. Pick the process and mark where it starts and ends.
2. Walk the process in person, following one real item from start to finish.
3. Write each step on a sticky note and place it in the lane of whoever does it.
4. Add the decisions, hand-offs, and waiting points.
5. Check the map with the people who do the work, and fix anything they say is wrong.
6. Mark the problem spots: errors, delays, rework, and missing feedback.

Map the process as it actually works today, not as the procedure manual says it should work. Teams often call this the as-is map. Once the as-is map is right, the team can draw a should-be map showing how the process will work after the improvement.

The Should-Be Map

After the fix, the team drew a should-be map. Only three steps changed, but they changed the whole process, because together they created the feedback loop that had been missing.

Step	Who Does It	What Changes
4	Returns dock	Staff choose the freight class by hand, with the package weight shown beside it and the photo guide posted at the dock
6	Receiving warehouse	Receiving compares the label to the freight for any return the billing check has flagged
7	Billing	An automatic check flags class and weight mismatches and sends them back to the dock within one day

Try This at Work

1. Draw a flowchart of a simple process you know well, using the standard symbols. Then read it back with the five questions.

2. Count the hand-offs in one process at your workplace. Pick the one where problems happen most often.

Discussion Questions for Your Team

1. What surprised you most the last time you saw a process drawn out from start to finish?
2. Why do as-is maps so often differ from the official procedure?
3. Where in your team's work does information get lost at a hand-off?

Module 45: Choosing Among Options With a Decision Matrix

Chapter 6 showed how to narrow many ideas to a few finalists and reach consensus. When finalists are close, or the decision has several competing concerns, a decision matrix brings the reasoning into the open. It compares each option against the same set of criteria, so the team argues about what matters instead of about whose option is best.

How to Build a Decision Matrix

1. List the options you're choosing among.
2. Agree on the criteria that matter, such as cost, effectiveness, speed, or ease of use.
3. Weight each criterion by importance, on a scale of one to five.
4. Score each option on each criterion, again on a scale of one to five.
5. Multiply each score by its criterion's weight, and add up the results for each option.
6. Discuss the results before deciding.

The team should agree on the criteria and weights before scoring any option. Otherwise, people tend to adjust the weights until their favorite option wins.

A Worked Example

Priya's team had to decide how to train dock staff at Eau Claire. There were three options: a classroom session at the warehouse, short coaching sessions on the dock using the photo guide and real returns, or an online video. The team agreed on four criteria and scored each option.

Criterion	Weight	Classroom	Dock Coaching	Online Video
Builds the hands-on skill	5	3	5	2
Low cost	3	3	4	4
Little time off the dock	4	2	4	5
Works for new hires later	4	2	3	5

Adding Up the Scores

For each option, multiply each score by the weight and add the four results. Classroom training scores fifteen, nine, eight, and eight, for a total of forty. Dock coaching scores twenty-five, twelve, sixteen, and twelve, for a total of sixty-five. The online video scores ten, twelve, twenty, and twenty, for a total of sixty-two.

Option	Weighted Total
Dock coaching	65
Online video	62
Classroom	40

The Matrix Informs, the Team Decides

A decision matrix doesn't make the decision. It organizes the thinking. In this case, the matrix ruled out classroom training clearly. But dock coaching and the video were close, and they were strong in different ways. Coaching built the skill best. The video was better for new hires who would start after the pilot.

So the team chose both: dock coaching for everyone during the pilot, plus a short video for new hires to watch on their first day. When two options score close together, look at why before picking the higher number. Often the best answer combines them.

Other Quick Ways to Compare Options

A decision matrix is worth the effort for important choices. For smaller ones, two lighter tools often do the job.

Pros and cons. List the advantages and disadvantages of each option side by side. It's quick, but it treats every point as equally important, so use it when the stakes are low.

Impact and effort. Sort each option by how much good it would do and how much work it would take. The four combinations point to four different actions.

Impact and Effort	What to Do
High impact, low effort	Quick wins. Do these first.
High impact, high effort	Major projects. Plan them carefully.
Low impact, low effort	Fill-ins. Do them when there's time.
Low impact, high effort	Usually not worth doing.

Try This at Work

1. Build a decision matrix for a choice your team faces. Agree on criteria and weights before anyone scores an option.

2. After scoring, ask whether a small change in one weight would flip the result. If it would, the decision needs more discussion.

Discussion Questions for Your Team

1. When has your team made a decision that looked obvious until someone listed the criteria?
2. Why is it important to set the weights before scoring the options?
3. When should a team go against what the matrix shows?

Module 46: The PDCA Cycle

Even a well-chosen solution is still a prediction. The team thinks it will work. The PDCA cycle is how you find out, on a small scale, before betting everything on it. PDCA stands for Plan, Do, Check, Act.

The cycle grew out of the work of statistician Walter Shewhart in the 1930s and was spread by W. Edwards Deming, who taught it to Japanese managers after World War Two. Deming later preferred to call it Plan, Do, Study, Act, to stress that the third step is about learning, not just checking a box.

The Five Steps

PDCA is usually drawn as a circle with four phases. This course adds a fifth step, standardize. It comes from Masaaki Imai, who introduced many Western managers to kaizen, the Japanese approach to continuous improvement. Imai paired PDCA with a companion cycle that begins with Standardize. PDCA finds a better way. Standardizing makes sure the better way becomes the normal way.

Plan. Decide what change to test, what you predict will happen, how you'll measure it, and who will do what. Keep the test small.

Do. Carry out the test as planned, and write down what happens, including surprises and problems.

Check. Compare the results to your prediction. Did the change work? What did you learn?

Act. Decide what to do next. Adopt the change if it worked, adjust it and test again if it partly worked, or abandon it if it didn't.

Standardize. Once a change works, build it into written procedures, training, and measures so it lasts, then look for the next improvement.

Why Test Small?

A small-scale test limits the damage if the change doesn't work, costs less, and teaches faster. It also builds support. People who were unsure about a change are far more willing to accept it after seeing it work on a real dock, with real people, for a real month.

PDCA Questions at Each Step

Step	Key Questions
Plan	What are we changing? What do we predict will happen? How will we measure it? Where, when, and with whom will we test it?
Do	Did we carry out the plan as designed? What happened that we didn't expect?

Step	Key Questions
Check	How do the results compare to our prediction and to the baseline? What did we learn?
Act	Should we adopt, adjust, or abandon the change? What will the next cycle test?
Standardize	What procedures, training, and measures need to change so the improvement lasts?

A Quick Example Outside Cedarview

PDCA works on problems of any size. Imagine a maintenance team at a small manufacturer that wants to cut the time it takes to switch a machine from one product to another. In the Plan step, the team predicts that setting out every needed tool before the switch will cut the changeover from about forty-five minutes to thirty. It decides to test the idea on one machine for two weeks. In the Do step, it runs the test and times every changeover. In the Check step, it finds the average fell to thirty-four minutes, and that most remaining delays came from hunting for one missing wrench. In the Act step, it adds a dedicated tool cart and runs a second cycle. Once the target is met, the team standardizes the new routine with a checklist posted on every machine.

PDCA and the 7-Step Method

PDCA fits inside the 7-Step Method from Chapter 7. Step four, developing and testing a solution, is the Plan and Do. Step five, checking the results, is the Check. Step six, standardizing the improvement, is the Act and Standardize. Many improvements need more than one trip around the cycle, each one building on what the last one taught.

Try This at Work

1. Pick a small change you'd like to try in your own work. Write a one-paragraph plan with a prediction and a way to measure it.
2. Run the test for two weeks, then check the results against your prediction.

Discussion Questions for Your Team

1. When has your organization rolled out a change everywhere at once? How did it go?
2. Why is writing down a prediction before a test so important?
3. Which step of PDCA do teams most often skip? What happens as a result?

Module 47: Using PDCA to Build and Test a Training Plan

Many improvements depend on people learning to do something new. That makes training one of the most common changes a team will need to test. This module walks through building a training plan and testing it with the PDCA cycle, using the Eau Claire pilot as the example.

What a Training Plan Includes

Element	Question It Answers	Eau Claire Pilot
Goal	What should trainees be able to do afterward?	Choose the correct freight class for the eight most common types of return
Audience	Who needs the training?	All fourteen returns dock staff on both shifts
Content	What will be taught?	How freight class works, reading the photo guide, and using the new label screen
Method	How will it be taught?	Twenty-minute coaching sessions on the dock, using real returns
Trainers	Who will teach it?	Luis and Willa
Schedule	When will it happen?	Weeks one and two of the pilot, at the start of each shift
Materials	What is needed?	Photo guide, practice returns, and the new label screen
Measures	How will we know it worked?	Freight class errors on the checksheet, and a short skills check after training

Writing Learning Objectives

The goal of a training plan should describe what trainees will be able to do, in terms someone could observe. Words like understand and know are hard to measure. Action words like choose, identify, demonstrate, and explain are easy to check.

Weak Objective	Stronger Objective
Understand freight classes	Choose the correct freight class for the eight most common types of return
Know the new label screen	Complete a return label on the new screen without help
Be aware of the photo guide	Use the photo guide to identify the class of a repacked return

Plan

The team predicted that freight class errors at Eau Claire would drop by at least three quarters within four weeks. The baseline came from the original two-week checksheet, which showed fourteen freight class errors at Eau Claire. The team would count errors the same way during the pilot, so the before and after numbers could be compared fairly.

Do

IT reconfigured the label template at Eau Claire, and the photo guide went up at the returns dock. Luis and Willa trained the day shift over the first two weeks, and Farah kept the checksheet. The team wrote down everything that happened, including the complaints.

Check

In the last two weeks of the pilot, Eau Claire recorded three freight class errors, down from fourteen. That was a drop of almost four fifths, better than the team's prediction. But the check also turned up three problems. All three remaining errors came from the night shift, which had been trained late and only briefly. Two common return types were missing from the photo guide. And on the busiest day, choosing the class by hand added a few minutes to the dock's backlog.

Act

The team adopted the change and adjusted it. It added a full training session for the night shift and put the two missing return types in the photo guide. It also asked IT to make the most common freight classes selectable with one tap. It also recorded the five-minute video for new hires that the decision matrix had pointed toward.

Standardize

Finally, the team wrote the new steps into Eau Claire's returns procedure, added the video to new-hire training, and set up a monthly check of freight class accuracy. Then it planned the next cycle: the same change at Appleton, with the adjustments already built in.

Presenting the Plan

Teams often present a training plan and its results to leaders in a short slide presentation. Keep each slide to one main idea, use a few words instead of full paragraphs, and show results as simple charts, such as errors before and after. End with the decision you need from the audience.

Evaluating the Project Process

A pilot tests more than the solution. It also tests how well the team worked. Evaluate both. Each member can use the meeting skills checklist from Chapter 7 to look back at their own contributions and their teammates'. The whole team can use the after-action review from Chapter 4 to look at the project overall.

Try This at Work

1. Draft a training plan for a skill someone on your team needs, using the eight elements in the table.

2. Decide how you would test it on a small scale first, and what number would tell you it worked.

Discussion Questions for Your Team

1. Think of a training program you've attended. Which of the eight elements was weakest?

2. Why did the Eau Claire pilot uncover problems that the planning didn't?

3. How would you know whether a training program changed what people actually do on the job?

Module 48: Making Improvements Stick and Closing the Loop

Many improvements work beautifully for a few months and then quietly fade. Attention moves to the next problem. New hires never learn the new way. Old habits creep back. Measures still reward the old behavior. The last steps of the 7-Step Method exist to stop that from happening.

Ways to Make a Change Last

Write it down. Update the written procedure so the new way is the official way.

Train new people. Build the change into onboarding so it doesn't depend on the people who were there for the pilot.

Make it visible. Visual tools, like the photo guide on the dock, remind people of the right way at the moment they need it.

Mistake-proof it. Japanese engineer Shigeo Shingo, who helped develop the Toyota Production System, promoted poka-yoke, or mistake-proofing: designing a process so that errors are hard to make. The new label screen, which requires a freight class and shows the package weight right beside it, is a simple example.

Update the measures. Make sure scorecards reward the new way. At Cedarview, that meant adding return accuracy to every warehouse scorecard.

Name an owner. Someone has to be responsible for watching the process after the project team moves on.

A Simple Control Plan

A control plan says what will be checked, how often, by whom, and what happens if the numbers slip. Here is the one Priya's team handed off.

What We Check	How Often	Who Checks	If It Slips
Freight class accuracy on returns at each warehouse	Monthly	Warehouse returns lead	Retrain the shift involved and report to the operations manager
Billing mismatch flags	Weekly	Billing supervisor	Send the details back to the dock within one day
New hires completing freight class training	Each new hire	Warehouse supervisor	Hold the new hire from labeling returns until training is done
Customer complaints about return billing	Monthly	Customer Resolutions lead	Review with the returns lead to find the cause

Checking the Results

Before closing any project, compare results to the baseline, using the same measure collected the same way. Here is the before and after for Priya's project, using two-week checksheet counts at Appleton and Eau Claire.

Error Type at Appleton and Eau Claire	Before	After	Change
Wrong freight class	33	7	Down 79 percent
Wrong destination warehouse	14	3	Down 79 percent
Both types combined	47	10	Down 79 percent

Closing the Project

When the improvement is standardized and handed off, the project team closes out using the steps from Chapter 4. Write a final summary. Hand off every ongoing task to a named owner. Hold an after-action review. Celebrate, and make sure leaders see what the team accomplished.

Then take the last step of the 7-Step Method: plan for the future. Redo the Pareto chart with the new data. The biggest bar is gone, so something else is now the biggest. That becomes the next problem worth solving.

Back at Cedarview

Four months after the charter was signed, freight class and routing errors on returns at Appleton and Eau Claire were down by more than three quarters. The team had met its goal. Across all five warehouses, the share of returns billed at the wrong freight class or sent to the wrong warehouse fell from about 8 percent to under 3 percent. Customer complaints about return billing dropped every month.

Just as important, the feedback loop was fixed. The billing check now sent any mismatch back to the dock within a day. The people choosing the freight class finally heard about their mistakes while they still remembered the shipment.

With the photo guide and the billing check now in place at every warehouse, Farah redrew the Pareto chart. The biggest bar was now missing or mismatched paperwork, the problem Owen had pointed to in the team's very first meeting. Dana asked Owen to lead the next project. He laughed. "So I was right," he said. "Just about the wrong problem."

Try This at Work

1. Think of an improvement at your workplace that faded. Which of the six ways to make a change last was missing?
2. Write a simple control plan for one improvement your team has made.

Discussion Questions for Your Team

1. What is one process at your workplace that could be mistake-proofed? What would that look like?
2. Who owns the improvements your team made last year? Are they still working?

3. If you redrew the Pareto chart for your team's biggest problem today, what would the biggest bar be?

Chapter Summary

At the last meeting of the project, Dana brought Cedarview's vice president of operations to thank the team. Afterward, Priya stayed behind in the project room. About a year and a half earlier, she had been one of five people working alone in the same room, solving the same billing disputes over and over without knowing it. Now she had watched a group of people from five departments become a team, find a problem nobody had been able to see, and fix it in a way that would last. The work had needed good tools. But mostly it had needed people who trusted each other enough to say what they saw, and a way of working that turned what they saw into something better.

Here are the most important ideas from this chapter to carry forward:

1. Every process is a system of inputs, steps, outputs, and feedback. Slow or missing feedback lets the same mistakes repeat, so ask who finds out when something goes wrong and how fast.

2. Flowcharts show the steps of a process with standard symbols. Process maps add who does each step, which reveals the hand-offs where problems hide. Map the process as it really works.

3. A decision matrix compares options against agreed, weighted criteria. It organizes the thinking, and the team makes the decision.

4. The PDCA cycle tests a change on a small scale: Plan, Do, Check, Act, and then Standardize what works. Training plans are one of the most common changes to test this way.

5. Improvements last when they are written down, trained, made visible, mistake-proofed, measured, and owned. Then redraw the Pareto chart and start on the next problem.

Glossary of Key Terms

Plain-Language Definitions and Where to Find Them

These plain-language definitions cover the key terms used in this guide. The module listed after each definition is where the term is explained in the most depth.

Accidental manager. Someone promoted into management without any formal management or leadership training. See Module 19.

Action item. A specific task agreed on in a meeting, with one owner, a due date, and a clear definition of done. See Module 41.

Adjourning. The final stage of group development, when a team finishes its work, reflects on it, and disbands. See Module 8.

Affinity diagram. A way to organize a long list of ideas by silently sorting related ideas into groups and naming each group. See Module 34.

After-action review. A short, blame-free review built on four questions: what we expected, what happened, why they differed, and what we'll do next time. See Module 24.

Agenda. A list of meeting topics showing the purpose of each item, who leads it, and how much time it gets. See Module 40.

Anchoring. The tendency for the first number we hear to pull our later judgments toward it. See Module 33.

Argument. A claim plus the reasons given for believing it. See Module 32.

Assumption. Something taken for granted as true without being checked. See Module 32.

Availability bias. The tendency to judge vivid or recent events as more common than they really are. See Module 33.

Brainstorming. A method for generating many ideas quickly by holding off on judgment and building on each other's ideas. See Module 34.

Brainwriting. A form of brainstorming in which everyone writes ideas silently before the group shares them. See Module 34.

Cause-and-effect diagram. A diagram, often called a fishbone diagram, that organizes the possible causes of a problem into categories. See Module 29.

Charter. A short written agreement that launches an improvement project by stating its purpose, scope, goal, roles, authority, resources, and member expectations. See Module 39.

Checksheet. A simple form for tallying how often something happens, sorted into categories. See Module 27.

Coach. An experienced guide who helps an improvement team use the right methods and tools, without running the project. See Module 39.

Committee. A group that meets to discuss a topic and make recommendations, either temporarily or on a standing schedule. See Module 2.

Confirmation bias. The tendency to notice evidence that supports what we already believe and overlook evidence that doesn't. See Module 33.

Consensus. A decision every member understands, had a real chance to shape, and can live with and support. See Module 35.

Constructive feedback. Specific, timely information about behavior that helps someone improve. See Module 18.

Control plan. A plan stating what will be checked after an improvement, how often, by whom, and what happens if results slip. See Module 48.

Convergent thinking. Thinking that narrows a set of options down to the best choice. See Module 34.

Critical thinking. Careful, honest thinking about what to believe and what to do, based on evidence and open to other explanations. See Module 31.

Decision matrix. A table that compares options against weighted criteria to organize a team's reasoning. See Module 45.

Deductive reasoning. Reasoning from a general rule to a specific conclusion. See Module 33.

Delegation. Handing a task to someone else along with the result needed, the authority to act, and check-in points. See Module 20.

Distributed team. A team whose members work in different locations, sometimes in different time zones. See Module 12.

Divergent thinking. Thinking that generates many possible ideas without judging them. See Module 34.

Empowerment. Giving a team real authority to decide and act within clear limits. See Module 5.

Fallacy. A flaw in the logic of an argument that can make a weak argument sound convincing. See Module 33.

Feedback loop. Information about a process's outputs that flows back to the people who can improve the process. See Module 43.

Fist to five. A quick consensus check in which members show from zero to five fingers to signal their level of support. See Module 35.

Five Whys. A root-cause method that asks why a problem happens, then why again about each answer, until reaching a cause that can be fixed. See Module 28.

Flowchart. A diagram that shows the steps of a process in order using standard symbols connected by arrows. See Module 44.

Forming. The first stage of group development, when members are polite, unsure, and still learning about the goal and each other. See Module 8.

Gemba. A Japanese word for the place where the work actually happens. See Module 27.

Goodhart's law. The idea that when a measure becomes a target, it stops being a good measure. See Module 37.

Ground rules. Shared agreements about how team members will treat each other, communicate, work, and make decisions. Also called team norms. See Module 11.

Group. A collection of people who share a manager, a workspace, or a job title, but not necessarily a goal. See Module 3.

Groupthink. A pattern in which a group's desire for agreement overpowers its judgment, so doubts go unspoken and warnings are ignored. See Module 36.

Implementation plan. A plan for putting a change into place, including a vision statement, stakeholder impacts, likely resistance, and a plan of action. See Module 38.

Inductive reasoning. Reasoning from specific examples to a general conclusion that is likely but never certain. See Module 33.

Is and is not analysis. A technique for sharpening a problem statement by comparing where, when, and how a problem happens with where, when, and how it does not. See Module 26.

Joint review. A regular meeting in which an improvement team and its sponsor review progress, decisions, and obstacles together. See Module 39.

Kaizen. A Japanese approach to continuous improvement through many small, ongoing changes. See Module 46.

Listening styles. Preferred ways of listening. The four styles are people-oriented, action-oriented, content-oriented, and time-oriented. See Module 22.

Management by results. Managing mainly by setting targets and rewarding or correcting people based on whether they hit them. See Module 37.

Minutes. A short written record of a meeting's decisions, action items, and open issues. See Module 41.

Mistake-proofing. Designing a process so that errors are hard to make. Also called poka-yoke. See Module 48.

Multivoting. A way to narrow a list by giving each member a set number of votes and keeping the ideas with the most support. See Module 35.

Natural roles. The patterns in how people tend to contribute to a team, such as generating ideas or catching errors. See Module 10.

Nominal group technique. A structured method in which members write ideas alone, share them round robin, clarify them, and then rank them privately. See Module 35.

Norming. The stage of group development when members settle on shared expectations and trust begins to grow. See Module 8.

Pareto chart. A chart that sorts categories from largest to smallest with a running total, to show which few causes make up most of a problem. See Module 27.

Pareto principle. The pattern that a small number of causes often account for most of the trouble. See Module 27.

PDCA cycle. A method for testing a change on a small scale: Plan, Do, Check, Act. This course adds a fifth step, Standardize. See Module 46.

Performing. The stage of group development when a team works smoothly and needs little supervision. See Module 8.

Planning grid. A one-page table listing each task with its owner, start and due dates, resources, and status. See Module 23.

Popcorn brainstorming. Brainstorming in which anyone calls out ideas whenever they come, in no set order. See Module 34.

Potential problem analysis. A look ahead at what could go wrong with a plan, how likely and harmful each risk is, and how to prevent or respond to it. See Module 23.

Pre-mortem. A technique in which a team imagines its plan has already failed and works backward to find out why. See Module 36.

Problem owner. The person with the authority and responsibility to fix a problem or approve the fix. See Module 27.

Problem statement. A clear description of what is happening, where and when, how big it is, and why it matters, without a cause, solution, or blame. See Module 26.

Process approach. Treating repeated work as a system and asking what about the process allowed a problem to happen. See Module 42.

Process excellence. An approach that improves results by improving the processes that produce them. See Module 37.

Process map. A flowchart that also shows who does each step, which reveals hand-offs. See Module 44.

Project team. A team with a clear goal, a budget, and an end date. See Module 2.

Psychological safety. A shared belief on a team that it is safe to speak up, ask questions, and admit mistakes. See Module 7.

Quality circle. A small group of employees who meet regularly to find and fix problems in their own work processes. See Module 2.

Relationship conflict. Personal friction between team members, such as annoyance, dislike, or clashing personalities. See Module 17.

Root cause. The underlying reason a problem happens. Removing it stops the problem from coming back. See Module 25.

Round robin. A method in which members take turns in order, each offering one idea or passing. See Module 34.

Scope. What a project will and will not include. See Module 23.

Scope creep. The slow pile-up of extra requests that expands a project beyond its original scope. See Module 23.

Self-managed team. A team with a shared goal that plans, checks, and manages its own work without a supervisor directing it day to day. See Module 2.

7-Step Method. A structured path through a problem: define the project, study the current situation, analyze causes, develop and test a solution, check results, standardize, and plan for the future. See Module 42.

SIPOC. A tool that describes a process by its suppliers, inputs, process, outputs, and customers. See Module 43.

Social identity. The part of a person's sense of self that comes from the groups they belong to. See Module 14.

Social loafing. The tendency for people to ease off when their own effort is hard to see in a group. See Module 9.

Sponsor. A manager with the authority to approve an improvement project, provide resources, and remove barriers. See Module 39.

Stakeholder. Anyone affected by a project or able to affect it. See Module 23.

Standardize. To build a successful change into written procedures, training, and measures so it lasts. See Module 46.

Storming. The stage of group development when differences surface and members test ideas and influence. See Module 8.

Sunk cost. Time, money, or effort already spent. Sunk cost thinking means sticking with something because of what has already been put into it. See Module 33.

Symptom. The visible sign of a problem, as opposed to its root cause. See Module 25.

Task conflict. Disagreement about the work itself, such as which approach to take. See Module 17.

Task force. A team formed to answer one urgent question, which disbands when the question is answered. See Module 2.

Team. A collection of people who share a goal and depend on each other to reach it. See Module 3.

Vision statement. A short, concrete description of what success will look like after a change. See Module 38.

Workgroup. A set of people who do similar jobs side by side, mostly on their own. See Module 2.