

RESOURCE:

Team Advisory Board Facilitator's Outline



You will gain the most benefit from this initial Facilitation session if you use an independent party. If you choose to run it in-house, you will need to revise some of these questions, but don't skip them as you could find gaps between perception and reality that you are not currently aware of.

INTRODUCTION

Introduce the purpose of the day's discussion. Articulate that you are an objective observer and your goal for the session is to explore the interactions among team members and their roles in the company.

Discuss the general rules of the session: honesty, courtesy and participation. That's it.

If this session is not being led by the business owners, discuss the teams comfort level with having their views shared with the senior leaders of the business and come to an agreement with how this information can be shared.

Ensure you have a good note taker to hand as it's important as the facilitator that this is not you. You need to be focussed on listening rather than note taking.

Remember that although the objective of this meeting is not to engage in a complaint session, if it starts to occur it is still very useful information. More often than not, unhappy team members are not the source of a problem in the company - collective dissatisfaction is likely the result or symptom of problems within an organisation.

If the discussion becomes out of hand (accusatory, argumentative etc), take time out and then re-explain the objective of finding solutions for systems improvement whilst maintaining a constructive and courteous line of communication.

PART 1 - WARM UP

Your first question should serve to give you an idea of what each team member does (for bigger organisations), how they perceive their role in the company and what they believe the company does. The last two will assist you to identify any gaps between the company belief system and individual team members perception.

If everyone is not clear and working in the same

direction, this can be a key reason why businesses do not achieve the success they should or could.

Q:

- Describe your position/job and how long you have performed these duties
- How would you describe the overall mission of the company / Why are we in business / What differentiates us from similar companies/ competitors?
- On a scale of 1 to 10, how would you rate the company's effectiveness in meeting their overall mission/objective? Why?

PART 2 - CLIENT/CUSTOMER SERVICE

These questions should give you an understanding of how the company does business, what roles the team members have with customers and how important customer service is to the company:

Q:

- Who are our customers?
- How are our customers obtained?
- In summary, what do we do for our customers, from start to finish?
- At what stage in this process do you perform your duties?
- On a scale of 1 to 10, how would you rate the level of customer service that the company provides?
- If you could, what would you change to elevate the level of customer service immediately?

PART 3 - MANAGEMENT

The following questions are designed to help you understand how team members view the relationship among the owners & managers and highlight any possible gaps between perception and reality.

Q:

- Describe the organisational structure, as you perceive it
- Who are the key decision makers in the company?
- If you have a problem, who do you approach for the solution or to whom do you offer a solution for approval?
- Do you think the organisational structure is appropriate for this company?
- If you could, what would you change to improve the management/structure of the company?

PART 4 - THE TEAM

These questions will help you form an idea of how well the team works together and to what extent. These questions are designed specifically to assess how the team is evaluated and what performance standards, if any are currently in place.

Q:

- How would you describe the general environment? Team orientation? Work independently?
- In what way(s) do you interact with other team members to perform your duties?
- On a scale of 1 to 10, how would you rate the team's overall effectiveness in working efficiently to carry out the mission of the company?
- How is your individual performance measured? What standards have the owners/management adopted, if any to guide you in carrying out your duties to a high level?
- How do you measure your own performance? What standards have YOU adopted, if any, to guide you in carrying out your duties to a high level?
- How do you think team member performance should be evaluated?
- If you could, what would you change to improve the efficiency of the team's interaction?

PART 5 - SYSTEMS

This question should help answer any more straight forward operational issues that might be impacting performance

Q:

- Are there any systems or processes that you feel hinder you achieving your job to a high level?
- Are there any systems or processes that you have identified a way of improving?

PART 6 - CLOSING

These last 2 questions should assist you in gathering additional information not addressed in the previous sections. Utilise your intuition to probe deeper into areas that may impact the business' success.

Q:

- If you could wave a magic wand, what one thing would you change to improve the company, and why?
- Is there anything that anyone would like to add that we have not already discussed?

At this time, thank the team for their valuable input and let them know what the next phase of this process will involve. Set the next TAB meeting on the spot and identify when the notes will be circulated to give participants enough time to review the feedback and complete any necessary 'homework' in time for the next meeting.

If you have noted any particularly disgruntled participants or issues outside of the scope of the TAB, offer to hold a private discussion separately to see how these concerns can be addressed.