

<b>FACILITATION TECHNIQUE</b>	<b>Team Self-Assessment</b>
<b>CORE PURPOSE / FOCUS</b>	#team #group assessment #goal setting #collaboration
<b>PHASE</b>	#get-to-know #debrief #review
<b>SKILL / CONTENT</b>	#communication #evaluation
<b>TIME FRAME IN MINUTES</b>	Up to 15 minutes
<b>GROUP SIZE IN PERSONS</b>	More than 30 persons
<b>FACILITATION LEVEL</b>	Skilled
<b>COMFORT ZONE</b>	Stretch

## Introduction

This is a structured process designed for teams to explore the way they work together. The tight structure supports team members to be open and honest in their assessment. After reflecting as individuals, the team builds a collective map which can serve as the basis for further discussions and actions. The assessment is based around 6 dimensions. Each one encouraging the team to reflect and analyse a different and crucial element of their behavior.

Your team is a system. It is complex with multiple and interlocking parts. We like to borrow the term Operating System (OS) from the software industry, to denote a complex system that supports people to work (programmers to run) and is improved over time through constant, small iterations.

This workshop is an essential starting point for any team that wants to update its OS and evolve the way it works. Most teams work and grow organically, with little deliberate attention given to designing the working process, exploring interpersonal relations, and challenging traditional notions of hierarchy.

By taking the time to do a self-assessment a team can surface things that are implicit, and make them explicit. Only once they are explicit can a team talk about them and change them.

## Necessary tools (what you need)

- Pick a videoconferencing tool of your choice.
- Pick an [online whiteboard tool](#) that allows using large, zoomable canvas.

## Steps

1. This workshop uses 6 dimensions to frame the reflection and discussion. Write these and show them on a screen for the team to copy.
  - Team Relations & Environment
  - Information & Decision-Making
  - Responsibility & Accountability
  - Learning & Individual Purpose
  - Collective Purpose
  - Profit & Productivity

Draw 5 horizontal lines, splitting it into 6 equal sections and label each section with a dimension.

2. Now give them 30 minutes to reflect on these dimensions in silence. Individually, they should write down statements that apply to each dimension. These should all complete the sentence: As a team, we... (zooming in and adding as post-its)

Some will likely be positive or celebratory, others will likely be critical or development oriented. Ask members to arrange their statements, with the most development-oriented on the left and the most celebratory on the right.

**Facilitator notes:** *This workshop is not about blaming individuals for the team performance. When reflecting and analysing the team we are talking about the team as a whole, as an organism in and of itself.*

3. On a whiteboard draw a large version of the 6 sections that they have been working on. The aim of this step is to bring everyone's statements together to see where the team agrees and disagrees on the 6 dimensions.

One-by-one, invite the team members to share 2-3 post-its from each dimension. They should just read out what they have written. No additional explanation or justification is necessary at this point.

Again, they should put the more development-oriented statements to the left, and the more celebratory statements to the right.

4. The aim of this step is to narrow down the statements and remove any clear duplications.

Invite someone from the team to cluster the statements in silence. When they feel they are finished, ask the group if anyone feels strongly about changing the clusters. If they do, invite them up to make the changes.

Repeat this until nobody objects to the clustering. It may take a few rounds, but eventually you will arrive at a selection of statements that nobody strongly disagrees with. This is a consent-based group decision.

5. The aim of this step is to see what statements the group feels strongly about. You are going to do that through dot voting.

Ask the team members to look at the clustered statements. They should add a dot on the statements that they think are important to this team. The things they think

should be addressed, changed, or celebrated. There is no limit to the amount of dots they can use.

When everyone is finished voting, step back and look at the board / flipchart. The spread, density, and frequency of the dots will give you an immediate sense of what the team thinks is important.

6. The aim of this final step is to figure out the next steps!

Now is the time for a group discussion. The team should decide what to do with this information. Here are a few suggestions:

- Formally celebrate the positive statements in some way.
- Schedule 6 discussion sessions over the next few weeks, each one focused on one development-oriented statement from one of the dimensions.
- Present the document to another team, or to the whole company at an All Hands meeting or Brown Bag session.
- Run the Engineering Your Team OS workshop next week, to redesign your team's operating system in a highly deliberate manner.

**Facilitator notes:** *Editability and collaboration is key to this document being useful. The information and insights belong to the team. It is now the team's responsibility to make change.*

## Tips & Tricks

- When facilitating group discussion, we recommend participants use non-verbal means to indicate they'd like to speak. You can use tools like Zoom's nonverbal feedback options, a reaction emoji, or just have people put their hands up. The facilitator can then invite that person to speak.
- In step 5, use voting features such as Mural's voting session tool during the dot voting process. You can also add comments inside Google Docs or ask participants to add a thumbs up emoji to an idea in Slack to collect votes when using those tools.

## Source

<http://toolbox.hyperisland.com/team-self-assessment>