

## Team Competency #3

### Planning/ organization goals and strategies

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**Goal: Come to meetings prepared to discuss ideas and make progress on tasks**

**Problem: Meetings are disorganized and mismanaged**

**Strategy:** Prior to meeting send out an email asking members to suggest topics of discussion or tasks that need to be addressed during the meeting. Use this information to create an agenda for the meeting and email agenda to members.

*Example email:*

**RE: Agenda for Tues**

**Hi Everyone,**

**It's my turn to organize the meeting. Based on your responses, here is the agenda for Tues:**

**Problems we experienced during last meeting: (15 minutes total)**

(Josh--- he was organizing and evaluating the last meeting) report on issues that need addressing.

Suggestions for preventing/correcting these problems (discussion--  
-5-10 minutes)

**Updates on sub groups: (25 minutes total)**

Tom and Gill--- resource evaluation (10 minutes)

Derrick and Ticitia---Client needs (5 minutes)

Josh and Me--- Systems analysis (10 minutes)

We also want to set aside 20 minutes to discuss our next steps and plan a course of action.

This means our meeting should take about 1 hour so plan accordingly and bring what ever you will need to contribute.

Thanks,

Sara

**Goal: Develop a concrete plan of action and stick to it.**

**Problem: There is no clear plan for what to do.**

**Strategy:** Develop a plan together.

“The first thing we need to do is ... , the second this is ... , and the last thing is ... .”

**Strategy:** Help the team decide what each subgroup will do.  
“We need to decide who is going to do what.”

**Strategy:** Help the team develop a realistic time line for the plan.  
“I think it will take us about an hour to do... , how long do you two think it will take to do... ?”

**Problem:** The team is not sticking to the plan

**Strategy:** Set time aside to discuss current updates and next steps.  
“Okay, last time we did not get as far as we had planned, so I think we need to see where everyone is at and where we should go from here.”

**Strategy:** Evaluate the feasibility of the original plan.  
“We are way behind where we thought we would be by now, but I think we didn’t realize how difficult this part of the project would be. I think we should rethink our deadlines and maybe simplify a few things so we don’t get more behind.”

**Goal: Make joint plans and decisions**

**Problem:** People are not paying attention to each other or listening during planning.

**Strategy:** Make sure you can see everyone’s eyes are on the speaker.  
“I need everyone’s attention on Dante. This is important.”

**Strategy:** Ask someone to assist you during planning sessions.  
“Marisol, could you to make sure we are all listening and paying attention to each other while we decide what to do.”

**Goal: Have a method for assigning tasks**

**Problem:** People are assigned tasks that they can’t do or dislike.

**Strategy:** Help the team find out the capabilities and interests of each person  
“Which part of the work would each of you like to do?”  
“Chris are you good at ...?”

**Strategy:** Help the team assign tasks based on expertise and interests  
“Chris since you are good at ... , why don’t you work with Pat on that?”

**Strategy:** Ensure team members that next time they’ll get first pick  
“Debra got a task she didn’t want this time, so next time she gets first pick.”

**Goal: Work together and get feedback from others**

**Problem: People are working independently without getting any feedback.**

**Strategy:** Help ensure that the team works together whenever possible.

“Since this is the most important task, we should work on it together.”

“We don’t seem to be benefitting from each other’s input. Why don’t we finish up what we are doing in the next few minutes and then take some time to discuss what we have done and get some feedback.”

**Strategy:** When forming subgroups always make sure at least two people are working together so they can provide each other with feedback.

“We’ve got a lot to do this week. How about I work on this part with Mark and you three can tackle the second half? We can make sure to share what we have done half way through.”

**Goal: Come up with common goals and a plan**

**Problem: Not everyone agrees on a course of action.**

**Strategy:** Enlist assistance from a team member, such as the mediation manager.

“Sara, you’re not directly involved in this disagreement, so how about you help us to evaluate and decide on how best to proceed with...?”

**Strategy:** Decide together what you want to achieve.

“Do we all agree that our main goals are ...?”

**Goal: Ensure fairness**

**Problem: People feel they are getting an unfair deal.**

**Strategy:** Share unpleasant tasks.

“Since no one wants to do this and that, why don’t two of us do this and the other to do that?”

*Borge, Marcela.. (January, 2009). “Working with Teams” Workshop, College of Information Sciences & Technology, The Pennsylvania State University, University Park, PA.*