**LEARNER GUIDE**

**Identify responsibilities of a team leader in ensuring that organisational standards are met**

Unit Standard 242821

Level 4 Credits 6

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FORMATIVE ASSESSMENT

Formative Assessment SO 1 AC 1 - 4

Divide into groups

#### Case study

In a group, rate the leader’s effectiveness. Below are some typical leader statements. Rate the leader's effectiveness of each from the scale below.

5 Very effective

4 Fairly effective

3 Neither effective nor ineffective

2 Fairly ineffective

1 Totally ineffective

* *I don't want to catch you coming in late again.*
* *Peter, come into my office please. I've noticed that you are often late. Let's talk about it.*
* *Late again, huh?*
* *If you two don't settle your differences and quieten down I'll fire you both.*
* *This bickering has got to stop. I want to see you both in my office at lunchtime.*
* *While you're here, Pete, I've noticed a strained relationship between you and George. Do you want to talk about it?*
* *Come in, George. There seems to be an unusually high number of errors from your department. Is there something wrong?*
* *You did an excellent job on the Pretorius job.*
* *I was surprised to see how well you did.*
* *That job will certainly add to our production.*

#### Practical activity

* Refer to your team at work and write a short job description to find out what the tasks are that the team leader is responsible for.
* What are the responsibilities of the team leader?
* What authority does the team leader have?
* Explain what the team leader is accountable for?
* Organise the work team as you would do it
* Present your findings to the rest of the class

Formative assessment SO2 AC 1 - 3

This is an individual activity

* Refer to your team at work and explain what a team is. Also explain the purpose of your work team.
* Explain the role and expected outputs of each member of the team in relation to the purpose of the team
* Discuss your findings in your groups

Formative assessment SO3 AC 1 – 2

This is group activity. Discuss any team at work for this activity

* Elect a team leader. The team leader has to:
* Contract with team members regarding tasks, performance plans, targets and standards
* Allocate deadlines for achieving individual and team objectives
* Remember that the team leader has to do this in consultation with the team members
* Present your work to the rest of the class

Formative assessment SO4 AC 1 -

This is a group activity

* Refer to previous assessments and explain how the action plan will be implemented, taking into account the SOP of your organisation
* Reflect on potential difficulties in achieving the plan. Note these difficulties and make contingency plans
* Discuss the measures that are used in the workplace to monitor the outputs of the team against agreed targets and time allocations.
* Explain what you would do differently

Discuss your findings with your facilitator and the class

PERSONAL INFORMATION

|  |  |
| --- | --- |
| **NAME** |  |
| **CONTACT ADDRESS** |  |
|  |
| **Code** |  |
| **Telephone (H)** |  |
| **Telephone (W)** |  |
| **Cellular** |  |
| **Learner Number** |  |
| **Identity Number** |  |
|  | |
| **EMPLOYER** |  |
| **EMPLOYER CONTACT ADDRESS** |  |
|  |
| **Code** |  |
| **Supervisor Name** |  |
| **Supervisor Contact Address** |  |
|  |
| **Code** |  |
| **Telephone (H)** |  |
| **Telephone (W)** |  |
| **Cellular** |  |

INTRODUCTION

#### Welcome to the learning programme

Follow along in the guide as the training practitioner takes you through the material. Make notes and sketches that will help you to understand and remember what you have learnt. Take notes and share information with your colleagues. Important and relevant information and skills are transferred by sharing!



This learning programme is divided into sections. Each section is preceded by a description of the required outcomes and assessment criteria as contained in the unit standards specified by the South African Qualifications Authority. These descriptions will define what you have to know and be able to do in order to be awarded the credits attached to this learning programme. These credits are regarded as building blocks towards achieving a National Qualification upon successful assessment and can never be taken away from you!

## Structure

### Programme methodology



The programme methodology includes facilitator presentations, readings, individual activities, group discussions and skill application exercises.

Know what you want to get out of the programme from the beginning and start applying your new skills immediately. Participate as much as possible so that the learning will be interactive and stimulating.

The following principles were applied in designing the course:

* Because the course is designed to maximise interactive learning, you are encouraged and required to participate fully during the group exercises
* As a learner you will be presented with numerous problems and will be required to fully apply your mind to finding solutions to problems before being presented with the course presenter’s solutions to the problems
* Through participation and interaction the learners can learn as much from each other as they do from the course presenter
* Although learners attending the course may have varied degrees of experience in the subject matter, the course is designed to ensure that all delegates complete the course with the same level of understanding
* Because reflection forms an important component of adult learning, some learning resources will be followed by a self-assessment which is designed so that the learner will reflect on the material just completed.

This approach to course construction will ensure that learners first apply their minds to finding solutions to problems before the answers are provided, which will then maximise the learning process which is further strengthened by reflecting on the material covered by means of the self-assessments.

#### Different role players in delivery process

* Learner
* Facilitator
* Assessor
* Moderator

### What Learning Material you should have

This learning material has also been designed to provide the learner with a comprehensive reference guide.

It is important that you take responsibility for your own learning process; this includes taking care of your learner material. You should at all times have the following material with you:

|  |  |
| --- | --- |
| **Learner Guide** | **This learner guide is your valuable possession:**  This is your textbook and reference material, which provides you with all the information you will require to meet the exit level outcomes.  During contact sessions, your facilitator will use this guide and will facilitate the learning process. During contact sessions a variety of activities will assist you to gain knowledge and skills.  Follow along in the guide as the training practitioner takes you through the material. Make notes and sketches that will help you to understand and remember what you have learnt. Take and share information with your colleagues. Important and relevant information and skills are transferred by sharing!  This learning programme is divided into sections. Each section is preceded by a description of the required outcomes and assessment criteria as contained in the unit standards specified by the South African Qualifications Authority. These descriptions will define what you have to know and be able to do in order to be awarded the credits attached to this learning programme. These credits are regarded as building blocks towards achieving a National Qualification upon successful assessment and can never be taken away from you! |
| **Formative Assessment Workbook** | The Formative Assessment Workbook supports the Learner Guide and assists you in applying what you have learnt.  The formative assessment workbook contains classroom activities that you have to complete in the classroom, during contact sessions either in groups or individually.  You are required to complete all activities in the Formative Assessment Workbook.  The facilitator will assist, lead and coach you through the process.  These activities ensure that you understand the content of the material and that you get an opportunity to test your understanding. |

### Different types of activities you can expect

To accommodate your learning preferences, a variety of different types of activities are included in the formative and summative assessments. They will assist you to achieve the outcomes (correct results) and should guide you through the learning process, making learning a positive and pleasant experience.



The table below provides you with more information related to the types of activities.

| **Types of Activities** | **Description** | **Purpose** |
| --- | --- | --- |
| **Knowledge Activities** | You are required to complete these activities on your own. | These activities normally test your understanding and ability to apply the information. |
| **Skills Application Activities** | You need to complete these activities in the workplace | These activities require you to apply the knowledge and skills gained in the workplace |
| **Natural Occurring Evidence** | You need to collect information and samples of documents from the workplace. | These activities ensure you get the opportunity to learn from experts in the industry.  Collecting examples demonstrates how to implement knowledge and skills in a practical way |

### Learner Administration



#### Attendance Register

You are required to sign the Attendance Register every day you attend training sessions facilitated by a facilitator.

#### Programme Evaluation Form

On completion you will be supplied with a “Learning programme Evaluation Form”. You are required to evaluate your experience in attending the programme.

Please complete the form at the end of the programme, as this will assist us in improving our service and programme material. Your assistance is highly appreciated.

### Assessments

The only way to establish whether a learner is competent and has accomplished the specific outcomes is through the assessment process. Assessment involves collecting and interpreting evidence about the learners’ ability to perform a task.

To qualify and receive credits towards your qualification, a registered Assessor will conduct an evaluation and assessment of your portfolio of evidence and competency.

This programme has been aligned to registered unit standards. You will be assessed against the outcomes as stipulated in the unit standard by completing assessments and by compiling a portfolio of evidence that provides proof of your ability to apply the learning to your work situation.



**How will Assessments commence?**

#### Formative Assessments

The assessment process is easy to follow. You will be guided by the Facilitator. Your responsibility is to complete all the activities in the Formative Assessment Workbook and submit it to your facilitator.

#### Summative Assessments

You will be required to complete a series of summative assessments. The Summative Assessment Guide will assist you in identifying the evidence required for final assessment purposes. You will be required to complete these activities on your own time, using real life projects in your workplace or business environment in preparing evidence for your Portfolio of Evidence. Your Facilitator will provide more details in this regard.

To qualify and receive credits towards your qualification, a registered Assessor will conduct an evaluation and assessment of your portfolio of evidence and competency.

### Learner Support

The responsibility of learning rests with you, so be proactive and ask questions and seek assistance and help from your facilitator, if required.



Please remember that this Skills Programme is based on outcomes based education principles which implies the following:

* You are responsible for your own learning – make sure you manage your study, research and workplace time effectively.
* Learning activities are learner driven – make sure you use the Learner Guide and Formative Assessment Workbook in the manner intended, and are familiar with the workplace requirements.
* The Facilitator is there to reasonably assist you during contact, practical and workplace time for this programme – make sure that you have his/her contact details.
* You are responsible for the safekeeping of your completed Formative Assessment Workbook and Workplace Guide
* If you need assistance please contact your facilitator who will gladly assist you.
* If you have any special needs please inform the facilitator

### Learner Expectations

Please prepare the following information. You will then be asked to introduce yourself to the instructor as well as your fellow learners



|  |
| --- |
| Your name: |
|  |
|  |
| The organisation you represent: |
|  |
|  |
| Your position in organisation: |
|  |
|  |
| What do you hope to achieve by attending this course / what are your course expectations? |
|  |
|  |
|  |
|  |
|  |

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Programme Structure And Strategy | | | | | | | | |
| **UNIT STANDARDS 242821 Level 4** | | | | | | | | |
| **Credits 6: notional hours 60, classroom training 18 hours, workplace hours 42** | | | | | | | | |
| **Programme Outcomes** | **Page2** | **Outcomes** | **Time Allocation** | **Delivery strategy** | **EEK** | **CCFO** | **Formative Assessment** | **Summative Assessm: total time 42 hours** |
| INTRODUCTION | 4 |  | Introductory activities:  60 minutes | Discussion |  |  |  |  |
| Programme Overview | 4 |  |  |  |  |  |
| Personal Objectives And Expectations | 5 |  |  |  |  |  |
| **UNIT STANDARD 242821** | 6 |  |  |  |  |  |  |  |
| **Section 1: ROLE OF THE TEAM LEADER** | 8 | SO1 | 158 minutes | Discussion & slide show |  |  |  | Questionnaire |
| The Roles And Responsibilities Of A Leader | 9 | AC1, 2 |  | N/A | Identify and  solve problems |  | Workplace Research Assessment |
| Effective Team Leading | 15 | AC3 |  |  |  |  |  |
| Organising workers into teams | 19 | AC4 |  |  | Organise and  manage |  |  |
| Formative Assessment 1 SO 1 AC 1 - 4 | 26 |  | 60 minutes |  |  | Group activity: Case study |  |
| **Section 2: PURPOSE OF THE TEAM** | 28 | SO2 | 158 minutes | Discussion & slide show |  |  |  |  |
| What Is A Team? | 29 | AC1 |  |  |  |  |  |
| Purpose of a team | 31 | AC2 |  |  | Collect, organise and critically  evaluate |  |  |
| The role of team members | 34 | AC3 |  |  |  |  |  |
| Formative assessment 2 SO2 AC 1 - 3 | 38 |  | 60 minutes |  |  | Individual activity: Teams |  |
| **Section 3: CONTRACT WITH TEAM MEMBERS TO OBTAIN COMMITMENT** | 39 | SO3 | 158 minutes | Discussion & slide show |  |  |  |  |
| Contract with team members | 40 | AC1 |  | N/A | Communicate |  |  |
| The Standard Of Performance Required Of A Team | 40 | AC2 |  |  |  |  |  |
| Formative assessment 3 SO3 AC 1 - 2 | 46 |  | 60 minutes |  |  | Group activity: Discussion of teams |  |
| **Section 4: MONITOR PERFORMANCE** | 47 | SO4 | 158 minutes | Discussion & slide show |  | See the world  as a set of  related systems |  |  |
| Implement plans | 48 | AC1 |  |  |  |  |  |
| Anticipate problems | 50 | AC2 |  |  |  |  |  |
| Monitor Progress | 51 | AC3 |  |  |  |  |  |
| Measure Performance | 53 | AC4 |  |  |  |  |  |
| Formative assessment 4 SO4 AC 1 - | 58 |  | 90 minutes |  |  | Group activity: Action plan |  |
| **Revision** |  |  | **30 minutes** |  |  |  |  |  |
| **Summative questionnaire** |  |  | **90 minutes** |  |  |  |  |  |
| **Notional Hours** |  | **Classroom** | **18** |  |  |  | Workplace | **42** |

# UNIT STANDARD

#### Unit standard number

242821

#### Unit standard title

Identify responsibilities of a team leader in ensuring that organisational standards are met

#### NQF level

4

#### Credits

6

#### Purpose of unit standard

This unit standard explores the role of the team leader in ensuring that the team meets organisational or required standards.

#### Learning assumed to be in place

Learners should be competent in Communication and Mathematical Literacy at NQF Level 3

#### Unit standard range

* The role of the team leader with reference to their job description and the purpose of the team
* 'Area of responsibility' includes, but is not limited to, cost centre, section, department or team
* 'Junior managers' include, but are not limited to, team leaders, supervisors, foremen and section heads
* 'Standard Operating Procedures' (SOPs) may comprise formal written documents or accepted practices in the organisation
* 'Organisation' includes but is not limited to, workplace, work context, work unit, company, department or section

#### Specific outcomes and assessment criteria

**Specific outcome one:** Explain the role of a team leader in an organisation

**Assessment criteria**

* The role of a team leader in an organisation is explained with reference to their job description
* The responsibilities of a team leader are explained within the context of a work environment
* The concepts of authority, responsibility and accountability are explained with reference to the team leader`s own position in an organisation
* The organising of workers in teams is explained in terms of recognised theory and practice

**Specific outcome two:** Explain the purpose of the team

**Assessment criteria**

* The concept of a team is explained according to accepted theory and practice
* The purpose of the team is explained to the team members according to organisational requirements
* The role and expected outputs of each member of the team are identified in relation to the purpose

**Specific outcome three:** Contract with the team members to obtain commitment to achieve organisational standards

**Assessment criteria**

* Tasks, performance plans, targets and standards are discussed and agreed according to organisational requirements
* Time allocations for achieving individual and team objectives are agreed through a process of consultation

**Specific outcome four:** Implement, monitor and evaluate performance against team objectives and organisational standards

**Assessment criteria**

* Agreed plans are implemented according to Standard Operating Procedures
* Potential difficulties in achieving the plan are anticipated through reflection and feedback
* Team outputs are monitored against agreed targets and time allocations
* Variances to required outputs are identified and corrective action is taken where necessary

#### Critical Cross-field Outcomes (CCFO):

* The learner is able to identify and solve problems and make decisions in contracting with team members and monitoring performance against objectives
* Learners are able to organise and manage themselves while implementing agreed performance plans
* The learner is able to collect, organise and critically evaluate information by monitoring achievement against objectives
* The learner is able to communicate effectively in consulting and allocating tasks, thus gaining commitment for performance plans
* The learner is able to see the world as a set of related systems when relating the team`s purpose and performance to organisational requirements

# ROLE OF THE TEAM LEADER

#### Specific outcome one

Explain the role of a team leader in an organisation

#### Assessment criteria

* The role of a team leader in an organisation is explained with reference to their job description
* The responsibilities of a team leader are explained within the context of a work environment
* The concepts of authority, responsibility and accountability are explained with reference to the team leader`s own position in an organisation
* The organising of workers in teams is explained in terms of recognised theory and practice

## The Roles And Responsibilities Of A Leader

The job of a leader is to get the required results by employing these three key areas of leadership:

Achieving the task.

Building the team.

Developing individuals.

* This is the work the supervisor/team leader has to perform to be a successful leader. These skills are not inborn attributes or traits. They are skills that can be recognised, practised and developed.

The team leader therefore has to achieve the tasks expected of him and his team. The specifics of the task will be stated in his/her job description, as well as the job descriptions of the team members.

### Job description

A job description is a work guideline to specify the duties and responsibilities of a job – the content of the job. It indicates how a job is to be performed, and what duties must be carried out.

Job descriptions should describe definite tasks. The four main points to be included within a job description are:

* The job title
* The job location
* A description of the main function or role of the job
* A description of the main duties of the job, e.g. a detailed description of WHAT is done ‑ purpose, scope and duties, responsibilities of the job.

The need to accomplish the task or job to increase productivity is the most obvious duty of the leader. Some of the leader's contributions are:

* Knowing exactly what the job entails.
* An understanding of how it fits into the overall company and departmental objectives.
* Planning the work.
* Selecting and providing the necessary resources.
* Controlling the progress of the work.
* Follow up, evaluating and comparing results with the original objectives, in order to improve.

### Achieve the task

The team leader does this by doing the following:

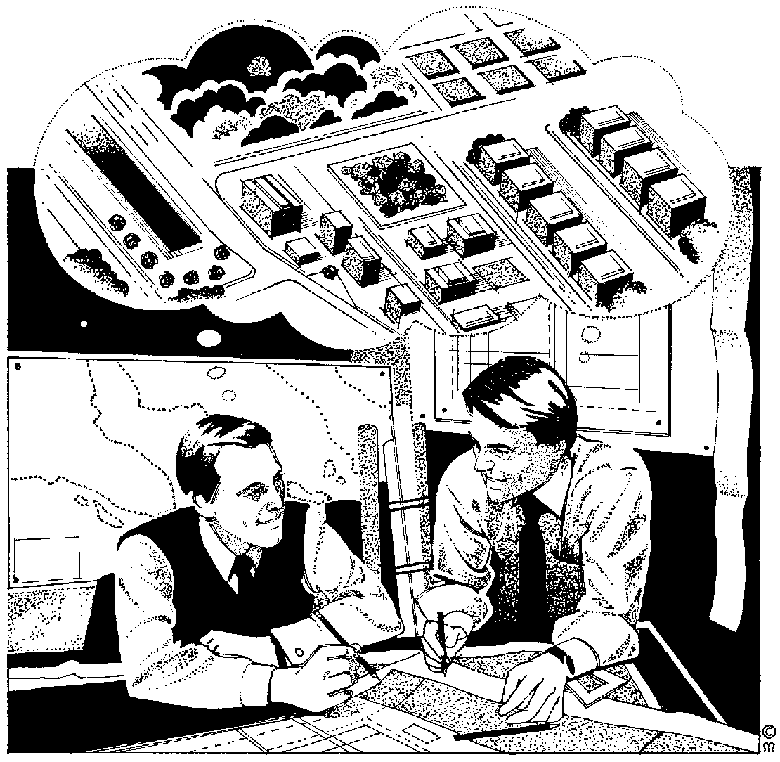
* Setting goals and objectives
* Developing and implementing action plans
* Delegating tasks to team members
* Managing resources
* Communicating progress and results to team members, management and other stakeholders.

#### Setting Goals And Objectives

As a team leader, you will be given goals and objectives to achieve. It is your responsibility to implement these objectives, even if you were not consulted when they were determined. This is your job, this is what you are paid for and YOU HAVE TO DO IT!

Right, so you get the goals and objectives from your manager. Now you have to implement these goals and objectives:

You have to **plan** how you are going toachievethe goals and objectives given to you. You do this by setting the goals and objectives for your department and then developing an action plan from the goals and objectives.

* Formulate goals and objectives, according to the strategic and tactical plans developed by top and middle management
* Ensure that goals are formulated in line with the vision and mission of the organisation
* While you formulate goals and objectives, you also set the standards for key performance areas where performance can be monitored continually. Key performance areas are performance areas in businesses that are important and that can be checked on all the time. For example, sales figures can be monitored continually as can production figures.

#### The Difference Between A Goal And An Objective

A **Goal** is a general outcome statement.

An **Objective** spells out clearly and in measurable terms, what the goal or aim will look like when met.

You first decide on a goal that can be achieved, to enable you to focus more accurately on the objective. It would be difficult to develop an objective without some idea [the goal] of what the goal is.

Therefore, **the goal is decided**upon first. Then we write our SMART objectives, is such a way that it will help everyone involved with it to attain it. This is why the goal always comes before the objective.

**Example**

* The Goal: Improve production in the assembly plant,
* The Objective: by 10% before January 15, by upgrading the machinery involved.

The goal is usually only the action or activity. That is, to diet, to stop smoking, to devote time to the children, to paint the house, or tidy the garage, etc. These goals are adequate for home and sport activities, but do not contain enough substance to enable anyone to really become seriously motivated to actually attain them.

#### Setting Objectives

****Objectives must always be SMART:

* **Specific**
* **Measurable**
* **Attainable**
* **Relevant**
* **Time bound**

**Specific**

Objectives must be specific. Don’t say, “I want to bake more cakes per day,” rather say: “I want to bake 50 cakes per day”.

**Measurable**

You must be able to measure the objective if you want to use it as a control system. How can you check if you are achieving goals and objectives if you don’t know against what you should check them?

Include as many of the following as possible:

* Quality: To SABS standard 1076; without any rejects; as per maintenance schedule rules, etc.
* Quantity: reduce rejects by 5%; tidy up all the scrap; a minimum of six bottles per case, etc.
* Cost/Value: reduce the overheads by 5%; cut the comptetitors price by at least Rl, etc.

**Attainable**

You have to set objectives that can be reached. If you set objectives that cannot possibly be reached, you are wasting time and you and your staff will become discouraged. You cannot possibly start baking 1500 cakes per day, if you have been baking 50 cakes per day.

**Relevant**

The objective must be relevant to the specific goal as well as the goals of the business. Don’t set an objective that has no relevance to the goal: “I want to make 45 meat platters per day” has no relevance to baking cakes. If your objectives are not relevant to the goal, you will confuse yourself and your staff.

**Time**

You have to set a date by when you want to achieve the objective. “ I want to bake 70 cakes per day by the end of February.” Examples could be: Within the next two weeks; by January 15; before lunch break/stocktaking/home time, etc.

An objective without a time parameter is like an athlete running a race without being timed. He may win, but how good is that?

#### General rules when writing goals and objectives:

* Always commit goals and objectives to paper. We tend to try and achieve goals once we have written them down.
* It is obvious that objectives must be clearly understood by all those who will be involved with them, so always use clear and simple language.
* Test the objectives on someone else first. If they express the slightest hint of doubt, don't argue ‑ fix it!
* Communicate both in writing and verbally, if you can.
* Clarify and confirm understanding: ensure that the people who have to do the work to achieve the goals understand what is expected of them. When you have to clarify understanding, ask the person to repeat in his/her own words what is expected of them. Then you can listen to what they are saying and check if they really understand.

#### Writing Objectives

Here’s a handy tool to use when writing objectives. Use this format and your objectives should always be SMART. remember to align all your goals and objectives with the strategic and tactical plans as made by top and middle management, as well as the vision statement of your organisation and department.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Objective** | **Target Date** | **Responsibility** | **Action Steps** | **Resources** |
| What must be done | By when it should be done | Who should do it | How should they do it | What resources will they need to do it |

#### Developing The Action Plan

Once you have written down your goals and objectives you have to develop plans for the realisation of the objectives. These plans are called action plans.

In the action plan you must specify and explain clearly **WHAT** has to be done, **WHY** it must be done, **WHEN** it should be done, **WHO** must do it and **HOW** it should be done.

See handout 3 for an example of an action plan

An action plan is like a map that you will use to find out if things are being done the way you want it done.

Write an action plan for the first two objectives. Use the action plan template in handout 4.

#### Implement An Action Plan

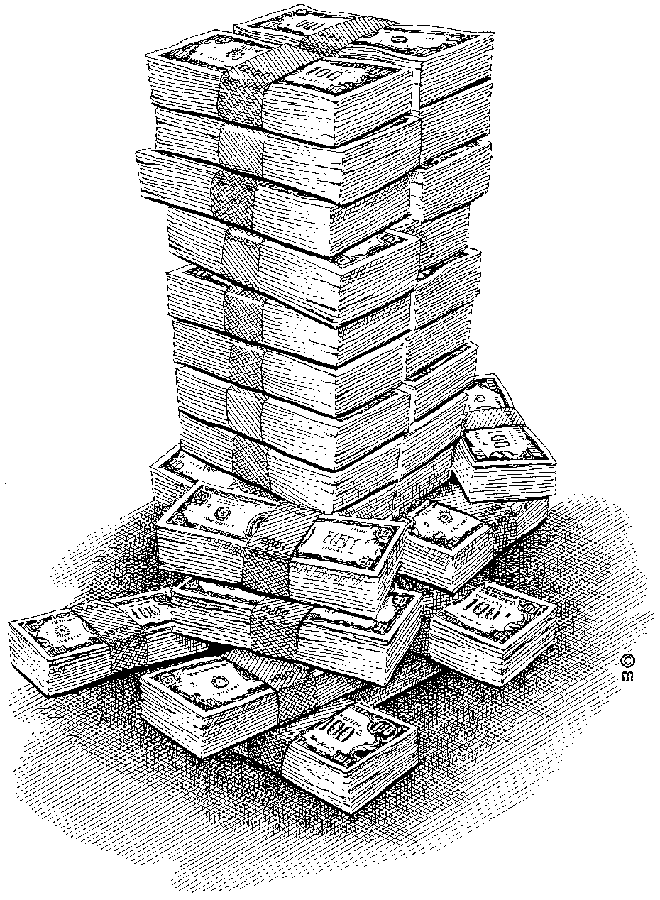
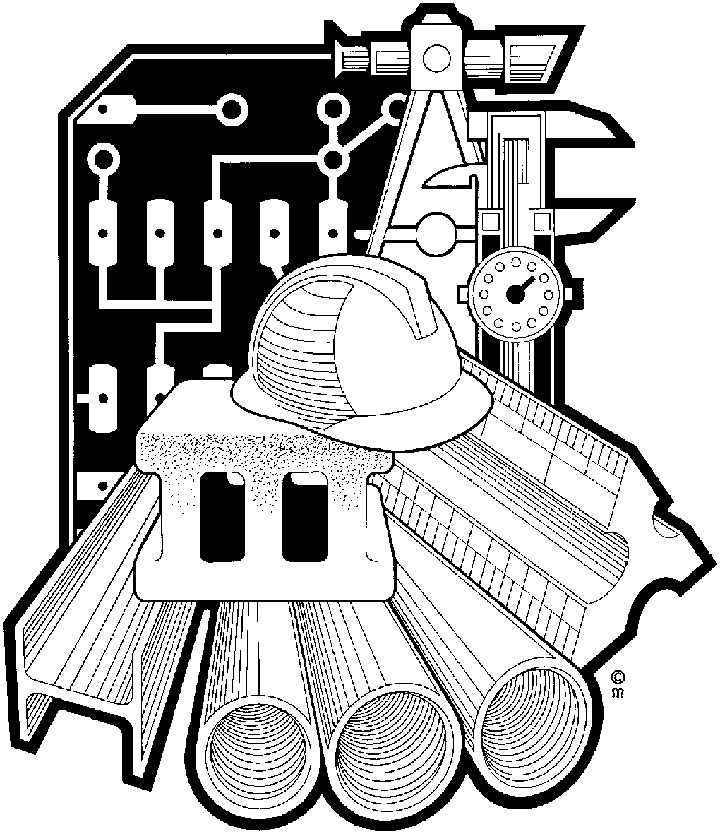
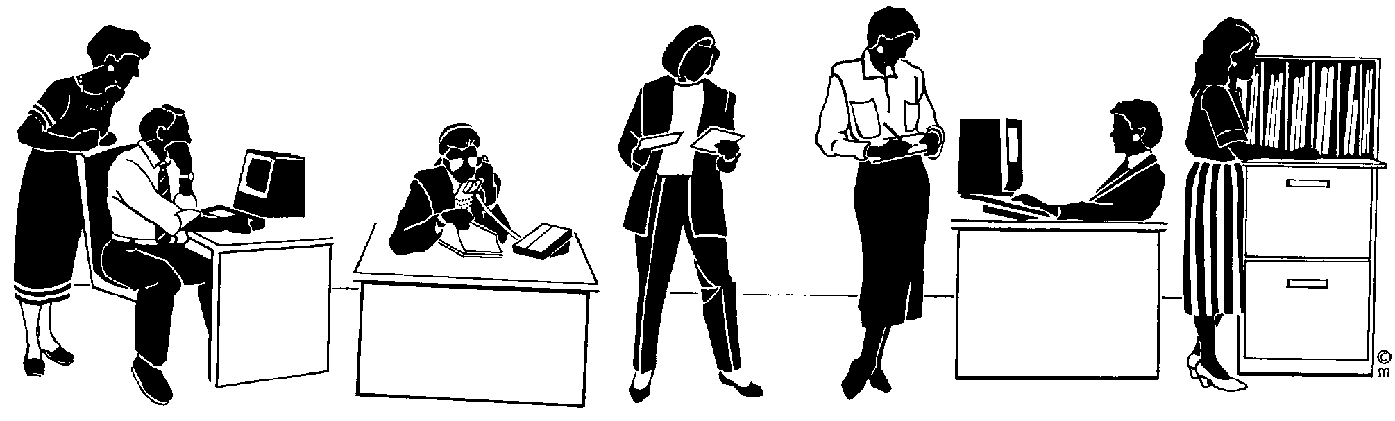
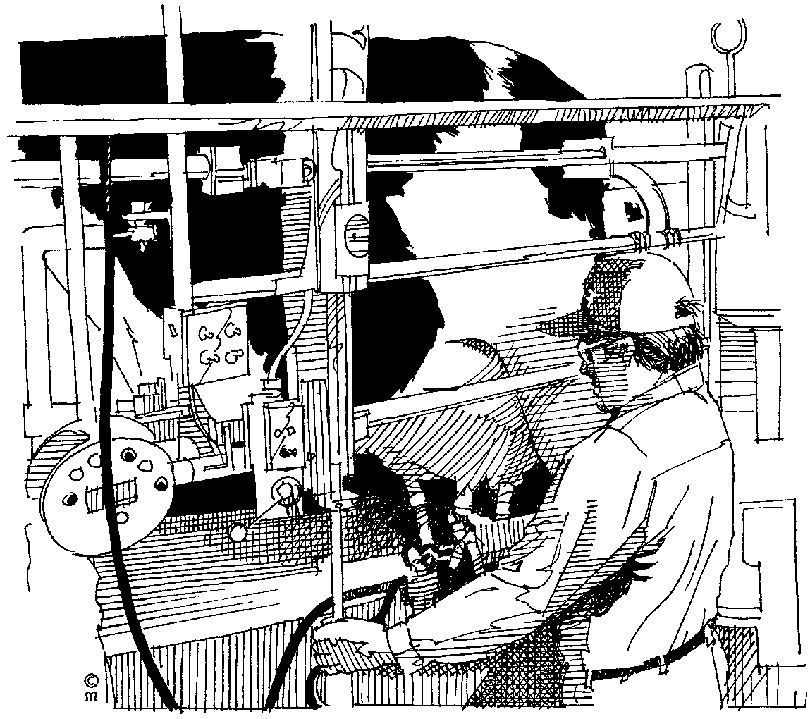
The previous steps in the planning process concerned the thought process. These ideas and goals, as well as the manner in which they are to be achieved must now be brought into operation and must be evaluated continuously.

Plans do not mysteriously activate themselves. You must put the plans into effect. One of the problems about planning is that too often the planners are not the doers. As a result, detailed plans running to hundreds of pages may do no more than gather dust.

Planning, no matter how carefully and painstakingly done, is useless and a waste of time without **commitment and action.**

This means that you have to start doing the things that must be done according to the action plan, or see that the people who must do it, are doing it. This is the **activating** process. You have to **communicate** your goals and objectives to the people involved, you have to **delegate** roles and responsibilities and you have to **coordinate** the efforts of your staff and other sections or departments.

You also have to **organise** your resources:



* Man: Human Resource
* Material: the raw materials you need for production
* Machinery: the equipment you will need in production or transport
* Methods: the procedures and policies of the organisation
* Money: the money available to do the job
* Markets: the clients
* Information: needed to make decision

#### Managing Resources

Resource management is a very important task of the team leader. In simple terms the successful management of an organisation implies the successful management of its resources.

**Human resources**

Human resources are probably the single most important resource in business today. People make things happen and can surely be viewed as the heart and nerve centre of any business.

**Money**

Without money no business can operate and it is therefore essential to secure the necessary funds to start and operate a business.

**Material and Machinery**

When we talk about machines as a resource, we do not only mean the big drills, presses, cutting machines, we also mean all the tools that are used, like spanners, hammers, saws, screwdrivers, etc. Materials are also referred to as consumables, or things that are used up. This would include things like our raw materials such as wood (furniture), rolls of yarn (clothing), sheets or coils of steel (engineering) or sand (building), etc.

The supervisor usually entrusts his materials to the store for safekeeping and requisitions them out only when needed. The store's job is to look after and keep track of all the materials.

Material and machinery are also called physical resources. Physical resources play a key role in the rendering of a service or the production of a particular product. In a transport operation, physical resources refer to premises, vehicles, operating equipment etc.

Machines must be maintained and serviced, materials should be safeguarded and stored correctly.

**Methodologies, policies and procedures**

Knowing how to do a job is a very important resource for everyone in the organisation. This operator’s manual is a significant resource for the small operator.

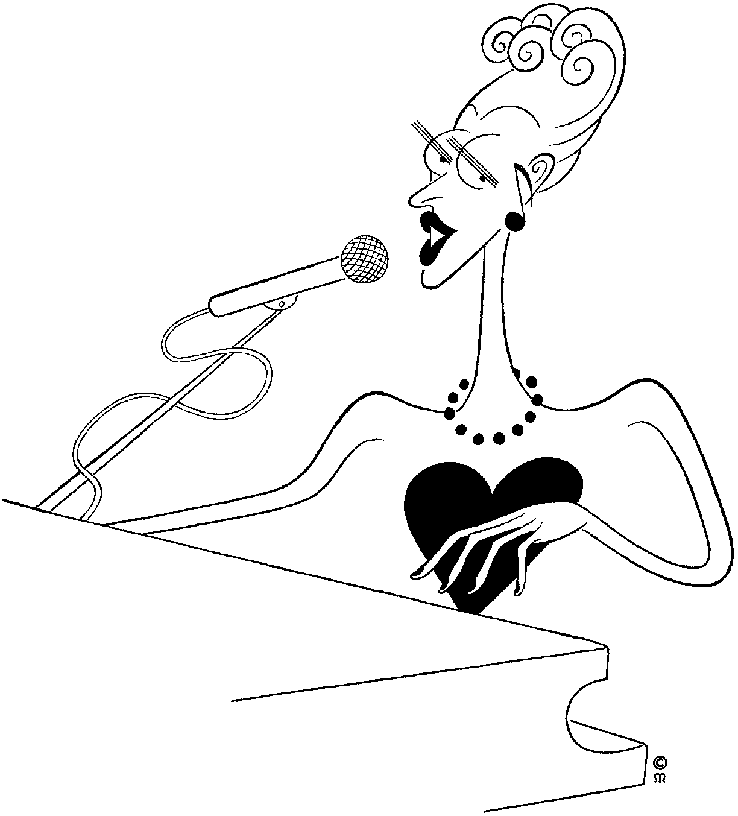
**Information**

When information is not provided on time and accurately, informed decisions about a problem cannot be made. In the transport environment, information is also of strategic and management importance.

#### Communication

Once you have developed your action plan, you have to communicate the details of the plan to your fellow team members.

* What has to be done,
* By who it should be done,
* By when it should be done
* How it should be done
* Which resources do they have available to do the job

It is important to note that you should not only communicate the details of the job to the employees, you must also advise them

* How their jobs fit into the organisation,
* How their jobs help the organisation to achieve it’s goals and objectives
* And how their jobs relate to the organisation’s mission and vision statement, as well as that of the department.

When you communicate the action plan to your team members, you have to ensure that they understand exactly what they have to do.

#### Delegating

Delegating is the process of getting the work done through other people, in this case the team members. Delegating is a process – follow these steps when delegating:

**Step One: Assign Functions**

The manager assigns tasks and activities relating to the work to a subordinate for implementation and completion. If a manager wants a letter to be typed, he will assign this task to his secretary.

When a task is assigned, the manager must ensure that the employee knows exactly what is required. This is usually done by means of a job description and the identification of critical responsibility functions.

It is not enough for the manager to say: “Type a letter to ABC Company. The secretary has to know the content of the letter, who at ABC Company the letter should be addressed to, when the manager requires the letter and so on. If you want someone to cut your hair, you should be specific regarding the style your require, otherwise the hairdresser might do something that you don’t like and then it does not help to blame the hairdresser – you are to blame.

During step one you do not assign responsibility, step one is regarded as training. You are monitoring the employee’s work in order to ensure that he can do the work on his own. Once he has shown you that he can do the work on his own, it is time for step two.

The marketing manager requests another employee to do market research for a new product. First the employee is fully briefed, then the employee approaches one or two customers while the manager monitors what the employee does: how does he approach the customers, how does he ask the questions, etc.

**Step Two: Assign Authority**

The delegation process gives a subordinate the power to act on behalf of management. Once the employee is sure of the specifics of the job that has to be done, you have to give the employee the authority to do the job. If the marketing manager requests another employee to do market research for a new product, the manager must give the researcher full authority to do effective research, once the manager is satisfied that the employee knows what is required and is able to do the job.

It would be pointless to ask someone to do market research and then that person is not allowed to make phone calls, or allowed to phone customers and ask questions. All the authority that is required to do the job must be assigned to the employee.

Authority - formal and legitimate right of a manager to make decisions, issue orders, and allocate resources to achieve organisationally desired outcomes

**Once the authority has been assigned, the manager must abide by decisions the employee makes. This is why the delegation process has to be monitored by the manager all the time, especially during the first two phases.**

**Step Three: Assign Responsibility**

The employee has now been assigned the function, he can do the job and he has been assigned the authority to do the job. The manager monitors the progress of the employee, because the job has been assigned and with the authority certain rights have been assigned. Now it is time to assign responsibility as well. Responsibility places an obligation on the employee to complete the tasks as required within the specified time limits. Failure to do so, will reflect badly on the employee.

Responsibility - duty to perform the task or activity an employee has been assigned

In other words, responsibility is the obligation the employee has to carry out the instructions – the work becomes the employee’s responsibility.

**Step Four: Creating Accountability**

Accountability is the obligation of the manager and the employee to ensure that the instruction is carried out with satisfactory achievement of goals – the work must be done in such a manner that the goals of the organisation are achieved.

Accountability - the fact that the people with authority and responsibility are subject to reporting and justifying task outcomes to those above them in the chain of command

## Effective Team Leading

For any team leader to effectively lead a team, s/he has to identify the strengths and weaknesses of the team. This is done by analysing the performance of the team.

The strengths and weaknesses of individual team members also have to be analysed, based on their individual performance, contribution to the team effort, commitment towards the team goals, attitude towards other team members, etc.

In team interactions there will be situations that cause concern or dissent in a group. Do not ignore these situations, analyse them, do a problem-solving exercise with the other team members in order to sort out the situation.

Then there will also be positive situations in team activities and these should also not be ignored. These should also by analysed to ascertain the causes and consequences of the situation, so that these positive situations can be repeated.

If you wish to be a successful leader, the following attributes should stand you in good stead:

#### Intelligence

Usually slightly higher than that of his subordinates. It is interesting to note that when the leader’s intelligence is excessively higher than that of his people, he often fails as a leader.

If a qualified civil engineer had to supervise the digging of a small garden, it would, for him, be just as exciting as watching paint drying on a wall. On intellectual level the engineer and the gardener are worlds apart.

#### Social Sensitivity

This simply means the ability to relate to other people. The leader should be “accessible” to his followers. He has to mingle and communicate with subordinates to keep in touch with them.

As far as he can, he should find out as much as possible about his team members. Know what their aspirations are, what motivates them, as well as what problems they might encounter, like domestic issues, financial difficulty, illness in the family, etc. Be sensitive to these issues and show empathy.

#### Social Participation

Participation in team activities outside of the working situation, like attending a sports event as a team will strengthen the bonds in the team and cultivate trust and team spirit. The leader will no longer be seen as “untouchable”, but as a partner who is an integral part of the team.

#### Communication skills

Effective communication skills are essential for successful leadership. The successful application of the abovementioned attributes totally depend on the efficiency of communication.

If the leader subscribes to an open door policy, and is fair, yet strict, his subordinates will feel free to communicate openly and honestly with him, knowing that they can trust him to treat them with empathy, yet objectively.

In addition to the abovementioned characteristics, the following attributes are also important:

* The ability to stimulate enthusiasm.
* Maintain a consistent level of expectation.
* Recognition of performance.
* Willingness to listen to new ideas.
* Sensitivity and empathy towards staff.

### Key Areas Of Leadership

How can a supervisor improve his performance as a leader? His effectiveness as a leader depends on his ability to influence, and be influenced by his people in the implementation of a common task. In practice this means:

* Ensuring that the required tasks are continually achieved.
* Building and reinforcing the needs of his group, for team work and team spirit.
* Satisfying the needs of each individual member of the group for self-fulfilment.
* The successful leader functions in all three areas simultaneously. These three key areas of leadership impact and overlap upon each other as shown in the illustration below.

### Developing Individuals

Each member of the group needs to express himself as an individual. As we noted in our module on motivation, each person has unique needs that must be satisfied. These needs are the mainsprings of motivation. If a leader can identify and then satisfy them, he will be developing each individual.

### Building the team

Most of the supervisors work is accomplished by people working as teams, or at the very least a team effort would certainly help him in most work.

The successful leader understands that a group has it’s own personality, power, attitudes, standards and needs. He will be successful if he takes this into account.

### Get To Know Each Team Member

Making a point of getting to know each of your people well enough to identify their motivation needs, that is, the five needs that Hertzberg identified in his research that made people want to work. Get to know what interests and motivates them, inside and outside the workplace. Simply keep your eyes open. Here are two examples to help you:

A person who always puts up all his certificates from training courses on the wall, obviously has a strong need to recognised. Meet that need by providing extra recognition for good work. A person who belongs to a lot of committees, , may be a good organiser and natural mixer. Put him in charge of a work group, or a position where he can fulfil this affiliation and belonging need in the workplace.

### Guidelines for motivation

* Recognise individual differences: each tem member has his own characteristics, needs, attitudes and expectations
* Team workers must be suited to their work according to their individual characteristics and aspirations
* Use objectives: team workers should have specific objectives about which you can give feedback. If there is opposition to objectives, implement participation when the objectives are set.
* Make sure that the objectives are seen as achievable: the person should be confident that his effort can lead to the achievement of the objective.
* Individualise rewards: use your knowledge of individual differences to individualise the rewards over which you have control
* Link reward to performance: rewards should be made dependent on performance and used to reinforce performance
* Control the system for equity: the person should see the reward of his/her efforts as being consistent with the inputs s/he made.
* Use positive reinforcement: this takes place by creating the “right” work environment, praise, removing obstacles to the person’s performance, control through feedback and communication
* Participation: participation in the setting of goals and objectives, the making of decisions, the implementing of the action plan, reviewing the progress of the action plan and feedback is a way of recognition. It makes the team member feel involved and accepted and creates a feeling of fulfilment.

### Rewarding Successful Team Performance

Be certain to reward performance. Good intentions, activity, hustle and bustle, loyalty, and goodwill may be valuable, but they constitute inputs. Outputs count. When team members have accomplished what you have asked them to, reward them.

* **Reward soon after the accomplishment**. Don’t wait. When people have done well and are feeling good about what they’ve done, reinforcing their success with a valued reward has great impact on the future actions.
* **Be specific about what you’re rewarding**. Let them know what accomplishments you’re rewarding them for.

### Treat Other People With Empathy

#### Empathy is

!

* Trying to put yourself into the world, thoughts and feelings of the other person, as he experiences them and not as you want to see them.
* To be in another person’s shoes. Your attitude is one of warmth, understanding and acceptance.
* You feel (name of feeling) because…(reason for feeling)
* Listen actively to identify the underlying feelings. “It sounds as if you are disappointed.”

#### Use these instead of “You feel…”

* It is important for you to …
* As I understand …
* So you feel…
* Are you saying…?
* If I understand you correctly…
* It seems as if…
* What you mean is…
* You think
* What bothers you …

#### How to express your own feelings

Use “I-messages”

“I feel …(name of feeling) because (reason for feeling)

or

“I feel ….because…and I would prefer that…

#### What are the benefits of communicating in this way?

* Other people can understand you better and it is easier to empathise with you. This prevents misunderstanding and conflict
* The other person does not feel threatened and will not withdraw, defend themselves or attack you.
* Express your opinion assertively and respect the dignity of the other person.

### How To Become A Leader

How can a supervisor improve his performance as a leader? Here is an interesting, and I hope helpful leadership checklist that will help a supervisor improve his leadership performance in each of the three key areas of leadership.

#### Achieving the task checklist

* Am I clear about my own responsibility and authority?
* Am I clear about my objectives?
* Do I have an Action Plan to reach these objectives?
* Can the jobs be reconstructed to get better results?
* Are physical layout, lighting and equipment right for the job?

#### Developing individual's checklist

* Has agreement been reached with each person as to his responsibilities and standards of performance expressed as results, not activities, by which we can both recognise success?
* Does each person have a prioritised list of agreed short-term targets?
* Does each person have the necessary resources?
* Do I know what each person's needs are?

#### Building the team checklist

* Do I set group agreed upon group objectives?
* s the group clear as to the working standards required?
* Are the right people working together?
* Do I build teamwork into the jobs?

## Organising workers into teams

### Groups in organisations

Group may be defined as:

‘In the broadest sense, a group may be defined as any collection of individuals who have mutually dependent relationship. This includes individuals who are in close physical proximity as well as those who have only a psychological attachment. While each group exhibits different behaviors, they do have much in common.’

Gray and Starke (1984:438)

Groups are the backbone of the organisation. They are responsible for attaining the goals of different departments and in the end they achieve the organisations goals. Managers are evaluated on the performance of their department as a whole and not in the results of individuals. Managers spend about 50-90% of their time as part of groups and it is important to know a little bit more about them.

The difference between a group and a team:

* A group has a clear leader and consists of two or more members who perform independent jobs with individual accountability, evaluation and rewards.
* A team has a small number of members with shared leadership and its members perform inter-dependant jobs with individual and group accountability, evaluation and rewards.

### Why are groups formed?

Managers need to understand why individuals decide to get together and form a group before they can determine how to use the group in an efficient way. The main reasons for forming a group is proximity, attraction, goals and economics. Lets look at each one in more detail.

**The needs of members of the group**: This is often the primary reason for the formation of groups. People join groups to satisfy their higher order needs. In order to satisfy their security needs people have to join a group. Groups give people a sense that they are not alone.

**People feel less threatened as a group** when dealing with management. New members in a group also rely on other members to help them to adjust. People also join groups as a form of self-realisation. They regard certain groups in the organisation as a status symbol.

**Proximity and attraction**: The way people interact with each other also leads to group formation. There are two important factors in personal interaction they are: proximity and attraction.

* Proximity has to do with the physical distance between employees. People who share an office will more likely form groups with each other than people who do not share an office.
* Attraction refers to how many people like each other. First impressions last. The physical appearance is very important. People consider height, mass, clothing; hair and skin colour as well as other hidden features. Very often people judge the person by their outward appearance and are “then placed in a box”.

**Group goals**: The goals of a group may also appeal to a person. A person could join a group to find out about a certain computer program. A new person may not have been informed about the goals of the group and will have to observe the rest of the group to find out what the goals are.

**Economics**: The members might think that they will derive a greater economic advantage by working in a group. If individuals are paid according to how productive they are as a group then they will join the group and try to be as productive as possible.

**Trade unions** are responsible for the well being of the workers that have a membership with them. The trade union will look after the employees’ benefits and well being. In an organisation where there is no trade union representation groups play a vital role in making sure of the well being of the employees. The larger the group the more “say” they have.

The following reasons have also been suggested for the forming of groups:

* Certain tasks can only be performed by a group of individuals working together.
* Groups may share unpleasant tasks between members, and so give individuals the opportunity to be innovative and creative.
* Groups provide companionship and a source of mutual understanding.
* Members of the group feel that they belong somewhere.
* The group provides guidelines for acceptable behaviour.
* The group may provide protection for its members.

### Formal and informal groups in organisations

#### Formal groups

* In a formal group the goals and activities are directed to achieve the organisational goals.
* Formal groups are part of the organisational process.
* Formal groups include departments, sections, task groups, committees etc.

#### Informal groups

* Here groups develop to satisfy the needs of its members.
* The aim of the informal group is or not necessarily the same as that of the organisation.
* An informal group may be e.g. a group of employees that have a common interest in running and then group together in an informal (friendship) group.
* An informal group may influence the organisations functioning, e.g. if a group of employees build up resistance to a certain manager.

### How management can use groups in organisations

* Management is mainly concerned with group members working together to achieve the organisational expectation of them.
* Performance of the group depends on the extent to which the group accepts or rejects the organisations goals.
* Cooperation in a group will be greater in a unified cohesive group.
* A manager will want subordinates in groups to work together and try and assist them to do so.
* The manager must keep all factors in relation to groups in consideration. The factors will include the individual members of staff and group identity and cohesion.

### Developing groups into teams

As explained earlier there is a difference between groups and teams. The trend in South Africa is toward the development of teams in the organisation rather than groups. There are several reasons for this development.

* It is a team and not a group that empowers people in the modern organisation.
* Teams are more productive than groups
* Modern management approaches are reliant on the team and not the group
* Teams are more flexible and can respond to changes easier than the group.

Managers cannot just expect employees to work together in a team. They need to b trained to work in a team. It must also be remembered that the management functions are handled differently in groups and in teams so it may take a while to adjust.

### Team Development

In any project context, we will be expected to operate in groups or teams. This session on project team development will prepare you as a manager and leader to develop and manage effective teams. The constant theme running throughout the session is how to develop groups into high performing teams.

|  |  |  |
| --- | --- | --- |
| **MODEL ON THE CHARACTERISTICS OF HIGH PERFORMING PROJECT TEAMS** | | |
| **P**urpose | * Sharing goals and plans. | **P** |
| **E**mpowerment | * Manage group behaviours and delegate. | **E** |
| **R**elationships and Communication | * Communicate effectively and manage conflict. | **R** |
| **F**lexibility | * Roles of team members and leader. | **F** |
| **O**ptimal Performance | * Solve Problems, plan and monitor effectively. | **O** |
| **R**ecognition and Appreciation | * Effective Communication. | **R** |
| **M**orale | 1. Motivation. | **M** |

### Stages Of Team Development

There are four stages in developing a team, Forming, Storming, Norming and Performing. Sometimes a team starts well but then something goes wrong, someone resigns, or another person joins the team and the team has to start from the beginning.

You might find that the team may go all the way to Norming and something happens and they have to go back to forming. In an ideal situation the four stages will work very well.

|  |  |  |
| --- | --- | --- |
| **Stage** | **Relationships** | **Task** |
| **FORMING** | Dependency on the leader | Orientate the group to the what, when, how, why, where, etc.  Develop ground rules |
| **STORMING** | Personal and  inter-personal conflict | The group is still trying to get organised, quarrel over leadership, power struggles, authority and responsibly problems.  It is critical to refer back to the group norms and ground rules. |
| **NORMING** | Cohesion, friendships, commitment | More data flow, information giving and receiving, greater exchange of ideas |
| **PERFORMING** | Inter-dependence | Creativity, problem solving |

### Recruiting the Team – Harnessing Team Skills

The first step in recruiting an effective team team is to look for a balance in skills needed for the team.

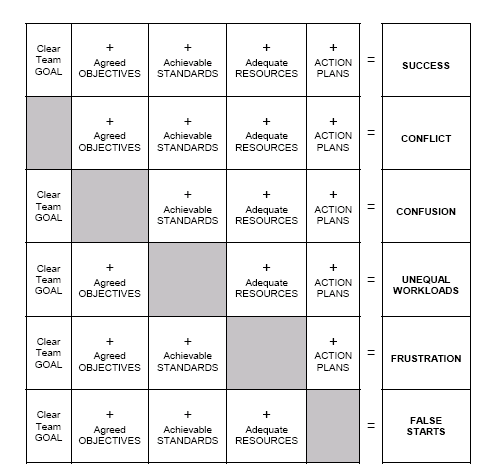
* **Functional skills.** These skills develop because of years of study or experience. Every team will need some form of these skills and the team leader will draw up a skills list, giving priority to those essential functional skills required.
* **Management skills**. Managerial skills mean the hands-on skills related to the everyday working of the team.
* **Interpersonal skills**. Team members with strong functional skills but little in the way of inter-personal skills will need to be balanced with those with inter-personal skills.

The team leader will want to ensure that people compliment each other and in order to achieve this, reviewing the following team roles will assist in identifying any gaps.

### Creating high performance teams

* Managers must restrict the number of members in the team to less than 12.
* A team needs different skills (technical, interpersonal and conceptual skills.) The right mix of these skills is essential.
* Role allocation is also very important. The role must be allocated to benefit the team. Personal preferences cannot take precedence over that of the group.
* Individual needs do need to be satisfied. When the team’s needs and the needs of the employee are being met then the individual is the most motivated.
* The team should have a clear vision that everybody shares. This vision should provide guidance under any and all conditions.
* The purpose must be translated into specific, measurable and attainable goals.
* Team members must be informed that they will be individually and jointly accountable for realising the team’s objectives.
* The reward system should be based on performance. Increased performance should be reflected in the reward that is given.
* Distribute workload evenly and co-ordinate effort (as long as everyone on the team contributes fully)
* Shared responsibility for problem-solving, testing ideas and decision-making
* Better motivation and support (through building rapport between colleagues)

Building a successful team takes effort. To be successful, a team needs to be united in the pursuit of a **goal**, with an agreed **process** to achieve the goal. However, in addition to focusing on the goal and meeting deadlines, the **needs of team members** must be addressed.



When working on a team, it is important to remember to treat colleagues as you would your customers. You can use customer service skills (attitude, active listening, assertiveness, negotiation, creative thinking, questioning, and so on) to manage your relationships within the team.

#### Transforming individuals into team members

This could become difficult in South Africa. Many managers are white and are very individualistic and do not work well in a team. To introduce teams into this environment requires that the right people are selected for the job.

People with the interpersonal skills to be team players should be employed. Secondly those employees should be trained to be team players. The reward system must encourage co-operation rather than individualistic behaviour.

#### Teams and management functions

Teams and groups need clear goals; well-developed plans, effective decision making and relevant information but the management functions are handled in different ways.

A big difference between management and teams is who makes the decisions. In a team the manager must allow members to become involved in the planning function. Managers become more focused on involving all members.

When organising both groups and team members must have a clear understanding of authority. With groups the manager holds the authority. In teams the members have higher levels of authority.

With groups there is one clear leader whereas with teams there will be a specific leader but he shares the responsibility with other team members.

Controlling will be the responsibility of team members who are assigned the responsibility.

### Characteristics Of Effective And Ineffective Teams

|  |  |
| --- | --- |
| **Effective teams** | **Ineffective teams** |
| **1. Information** | |
| Flows freely up and down | Flows mainly down |
| Full sharing, open and honest | Hoarded, withheld |
|  | Used to build power |
| **2. People relationships** | |
| Trusting, Respectful | Suspicious and partisan |
| Collaborative | Competitive |
| Supportive |  |
| **3.Conflict** | |
| Regarded as natural And helpful | Frowned on and avoided |
|  | Destructive |
| **4. Decisions** | |
| By consensus | Forcing and emphasis on power |
| Full commitment | confusion and dissonance |
| **5.Power Base** | |
| Shared by team | Hoarded |
| On competence | on politicking, alliances |
| **6. Motivation** | |
| Commitment to the team goals | Coercion and pressure |

### The Six C’s

The 6 C model shows how groups work as compared to a team. The first three 3Cs will show the attitude of workers who are not in a team, and the last 3Cs will show the benefits of having a team.

|  |  |
| --- | --- |
| **GROUPS** | **TEAMS** |
| **US vs. THEM** | **WE - Ness** |
| **Coercion – Confrontation – Coexistence** | **Co-operation – Collaboration – Co-ownership** |
| Characteristics in “US versus THEM” Mentality – blaming people for their situations | When individuals decide to focus on WIN – WIN relationship. |
| **Coercion**  People use coercive tactics of control and power to accomplish their goals. Force and threats are common. | **Co-operation**  One person will help another person to accomplish their goal |
| **Confront**  The disagreements are more open, the goal is to win and to make sure the “enemy” loses | **Collaborate**  People share ideas, resources and responsibility. |
| **Coexistence**  Agree to disagree, draw up boundaries, and minimise contact. | **Co-ownership**  Success leads to feelings of co – ownership. Commitment as the end results is evident. |

### Management Of Team Behaviours

Anticipate that members will perform one or more of the above mentioned group behaviours in any group situation. The facilitator or the group leader should ideally be the person who manages these group behaviours by ensuring that all team members perform a constructive role as opposed to a destructive role.

If you as a facilitator experience difficulty to manage the group behaviours effectively, keep the following in mind:

#### Purpose

* In order for teams to be high performing, all members should understand the purpose and goals of the team. A clear purpose assists members to know why they are part of the team, how every one fits in to the bigger picture and ensures that the needs and objectives of the individual, team, organisation and tasks are aligned with each other.
* The level of commitment and ownership will be higher the more involved team members are in co-developing the purpose and goals of the team.
* A purpose therefore ensures that every member will be able to recognise the important contributions their actions have to the greater whole, regardless of whether they perceive their roles as ‘important’ or ‘insignificant’.
* If the team has already developed its purpose, but members are not working in synergy, remind all the members of why they are there. If there is confusion regarding the purpose, clarify the reason for being together and the need to perform the task. Discuss and clarify the significant contribution that each member has in the successful completion of the task.
* If the discussion is not progressing, remind all the members of the purpose of the task. Link the key points made by members to the purpose of the task.

#### Ground Rules

* Establish ground rules to ensure that a conducive environment is created for constructive discussion and effective actions.
* Ground rules should cover the following broad categories:

**Values:** The values that will govern the team, e.g. trust, honesty, respect, etc.

**Processes:** How issues will be discussed, how feedback will be given; how the meeting will be chaired; how decisions will be made, etc.

**Responsibilities:** The roles that people will perform, e.g. chair, scribe, etc. and what is expected of each role; who will take responsibility for the actions arising from the discussions, etc.

**Communication:** The way in which issues will be discussed, processes to resolve conflict, etc.

**Logistics:** Time of meetings, venue, length of meeting, etc.

**Management Of Ground Rules:** What will be the consequences of a member not respecting the ground rules, etc.

Formative Assessment SO 1 AC 1 - 4

# PURPOSE OF THE TEAM

#### Specific outcome two

Explain the purpose of the team

#### Assessment criteria

* The concept of a team is explained according to accepted theory and practice
* The purpose of the team is explained to the team members according to organisational requirements
* The role and expected outputs of each member of the team are identified in relation to the purpose

## What Is A Team?

The most distinguishing characteristic of a team is that its members have, as their highest priority, the accomplishment of team goals.

To them, the most important business at hand is the success of the group in reaching the goal that its members, collectively and with one voice, have set. The members support one another, collaborate freely, and communicate openly and clearly with one another.

Groups on the other hand, tend to be collections of personalities with their own agendas.

Discussions and relationships in such groups are often characterised by shifting agendas, power subgroups, a going along with decisions rather than a wholehearted commitment, and even a win – lose orientation. One person or subgroup gains its wishes over another.

### Groups Versus Teams

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We have all had at least one experience of being part of a group. Sadly, we aren’t all able to share glowing encounters about how wonderful it was to work in a group. In fact, some people have had such horrific group experiences that the idea of instituting group work in a more formalised way sends nervous shivers down their spine. Then, on the other hand, others would propagate group work as an ideal method to get work done effectively and efficiently. How is it possible for people to perceive group work in such different ways?

This session is dedicated to unlocking the factors to why certain people have such wonderful experiences of groups, yet others have terrible experiences of working in groups, even when the conditions of group work are similar in both cases.

Or to put it in another way, how is it possible for one group to be high performing and produce dramatic results, whilst another group with the same number of people, doing a similar task with similar resources, is under-performing?

“Group behaviour has ranged from total chaos to dramatic success, but it is increasingly evident that groups enjoy their greatest success when they become more productive units called teams”. (Maddux: 1996:10)

The notion of **teams** is central to discovering why certain groups are successful and why others are not. Maddux defines a team as a group which becomes a more productive unit. The familiar saying of ‘a team is greater than the sum of all its individual parts’ echoes similar sentiments about a team being different to a group, because a team is able to yield far greater results than a group.

Maddux (1996:10) outlines the differences between groups and teams in the table below:

|  |  |
| --- | --- |
| **GROUPS** | **TEAMS** |
| Members think that they are grouped together for administrative purposes only. Individuals work independently, sometimes at cross-purposes with others. | Members recognise their interdependence and understand both personal and team goals are best accomplished with mutual support. Time is not wasted struggling over territory or seeking personal gain at the expense of others. |
| Members tend to focus on themselves because they are not sufficiently involved in planning the unit’s objectives. They approach their job as simply hired hands. | Members feel a sense of ownership for their jobs and unit because they are committed to goals they have helped to establish. |
| Members are told what to do rather than being asked what the best approach would be. Suggestions are not encouraged. | Members contribute to the organisation’s success by applying their unique talent and knowledge to team objectives. |
| Members distrust the motives of colleagues because they do not understand the role of other members. Differences in opinion or disagreement are considered as divisive. | Members working in a climate of trust and are encouraged to express openly ideas, opinions, disagreement and feelings. Questions are welcomed. |
| Members are so cautious about what they say, as they believe real understanding is not possible. Game playing may occur and communication traps be set to catch the unwary. | Members practise open and honest communication. They make an effort to understand each other’s point of view. |
| Members may receive good training but are limited in applying it to the job by the supervisor or other group members. | Members are encouraged to develop skills and apply what they learn on the job. They receive the support of the team. |
| Members find themselves in conflict situations which they do not know how to resolve. Their supervisor may put off intervention until serious damage is done. | Members recognise conflict is a normal aspect of human interaction but they view such situations as an opportunity for new ideas and creativity. They work to resolve conflict quickly and constructively. |
| Members may or may not participate in decisions affecting the team. Conformity often appears more important than positive results. | Members participate in decisions affecting the team but understand their leader must make a final ruling whenever the team cannot decide, or when an emergency exists. Positive results, not conformity, are the goal. |

Teams are therefore

* United around a common purpose and goal.
* Depend on each other to achieve this purpose and/or goal.
* Structured to work together.
* Empowered to implement decisions.
* Jointly responsible for the outcome of the task.

Pokras, S. (1995) Building High Performing Teams. London: Kogan Page.

### The Structure Of Teams

* Teams are usually small, consisting of between five and twelve members. If a team has more than twelve members, the manager should think about breaking the team into two sub-teams.
* Team member share leadership and responsibility. Role allocation is important. A sport team, such as Bafana Bafana, will have players with different personalities and preferences. A winning team needs a variety of skills: strong forwards, good defenders in the back line, fast attackers and a goalkeeper with safe hands. You can see that the goal is the performance of the team as a whole and not individual performances by the players. This can mean that the best attacker is left out of the team because his approach is too selfish and individualistic for the team to be successful. Team members can work well together if the manager matches individual preferences to the demands of team work.
* As can be seen from the example above, a team needs a variety of skills. In the workplace these skills are: technical, interpersonal, and conceptual skills. Technical skills have to do with the actual work that has to be performed, while interpersonal skills have to do with how team members work together. Conceptual skills have to do with how members understand and interpret things in the team: the goals, the timelines, the budget, how to achieve the goals, etc.
* The team leadership will be determined by the specific purpose and goals of the team. By rotating and sharing leadership the team benefits through participation by all team members. Sharing and rotating leadership also facilitates the best learning opportunities for team members. Functional tasks are distributed among team members over a period of time, thus giving every member the opportunity to practice leadership. Sharing leadership makes a lot of sense and should be a part of our daily existence: in our homes, schools, with our friends and also at work.
* Team members are usually rewarded for their performance individually and as a team.

## Purpose of a team

### What is the purpose of a team?

Teams are responsible for attaining the goals of different departments and, of course, ultimately, the goals of the organisation.

In other words, teams are started in order to work together to achieve the specific goals of the team, which are linked to the goals of the department, in order to achieve the goals of the organisation in the end.

The workplace environment has become very competitive in the twenty first century: South African companies have to compete with international organisations and they therefore have to think up new ways of improving productivity. South African companies also have to train and develop their human resources and reward employees for their achievements.

This is an area where teams are very effective.

### Teams in the business environment

#### j0233018Quality circles

These teams are groups of employees working in the same environment and who take responsibility as a team for quality processes in their own work environment. They ensure that the service to the customer is always outstanding and, when it doesn’t happen, they investigate the quality processes and, if necessary, institute new quality processes to ensure that the customer always gets the best service possible.

#### Production line teams

These teams work together on production lines. Examples are vehicle manufacturing teams, teams that work together to build furniture, bottle tomato sauce, pack peanuts. Everywhere where there is production or manufacturing, you will find these teams.

In the motor vehicle industry, these teams are responsible for the entire process to assemble vehicles and they take responsibility as a team for the quality of the work, the meeting of deadlines and the end product is delivered by the team.

As a team they also receive the benefits of achieving production goals, which may be bonuses or time off or whatever reward was agreed on.

#### Training forums

j0287005The team members are selected from various departments and they have to make the decisions regarding training and development of the employees in their own departments. This is, of course done in consultation with the employees, the training forum and the Human Resources department. The suggestions are then put forward to management for implementation.

#### Problem-solving teams

Teams that work in the same department and meet for a few hours per week to discuss ways of improving quality, efficiency and the work environment.

The production line teams for a motor vehicle manufacturer, can, for example, send representatives to weekly problem-solving meetings in order to address problems that affect every team and it’s achievement of goals.

In a restaurant or hotel, the kitchen staff can meet weekly to discuss customer complaints, more effective ways of preparing meals, the layout of the dining room, and so on. Similarly, the reception staff can meet weekly to discuss problems regarding the booking system of guests, the layout of the reception area, and so on. The suggestions are then laid before management for evaluation.

When a sports team has not performed well, a problem-solving team will get together to discuss errors made, in which area of the game should more training and exercise be focused on, etc.

#### Self-managed work teams

These are teams that function independently. They can make decisions and take steps to implement the decisions. They also take full responsibility for the outcomes of the decisions. These teams can employ new staff members, make equipment purchases, evaluate the performance of the team and even decide who should receive bonuses. Management of these teams is a responsibility of the whole team.

#### Cross-functional teams

Team members are usually made up of people on the same level, such as financial managers, operations managers, despatch managers and so on. This type of team usually operates in situations where difficult problems have to be solved and the knowledge and experience of specialists with different backgrounds are needed. These teams could be made up of people in the same organisation, but people from other organisastions can also be included.

For example, if your company bottles tomato sauce, the cross-functional team can consist of employees from your organisation, as well as the suppliers of the tomatoes and other products and even the clients that your organisation supplies to.

#### Study groups

A study group is an example of a team in the learning environment. Whenever you break for a group activity, you become a member of a study group.

You may also have a study group at home or the … where you and a group of fellow students get together to study. In this team, you will find that the roles the team members play varies according to the subject being studied: one member may be more knowledgeable about finances, while another helps the other team members with human relations. Each team member usually has a unique contribution to make to the study group, even if it is only making the coffee.

## The role of team members

### Team Roles

According to Dr Meredith Belbin's analysis of how teams work, as well as the job functions they perform, each team member can take on a role within the team dynamic.

Teams require the following basic roles to succeed:

* Creators (Plant and Resource Investigator) - to originate and discover ideas
* Leaders (Coordinator and Shaper) - to organize, manage and direct the team
* Implementers (Team Builder and Team Implementer) - to build and support the team and find practical applications of ideas
* Completers (Monitor Evaluator and Completer Finisher) - to evaluate and test ideas critically and in detail

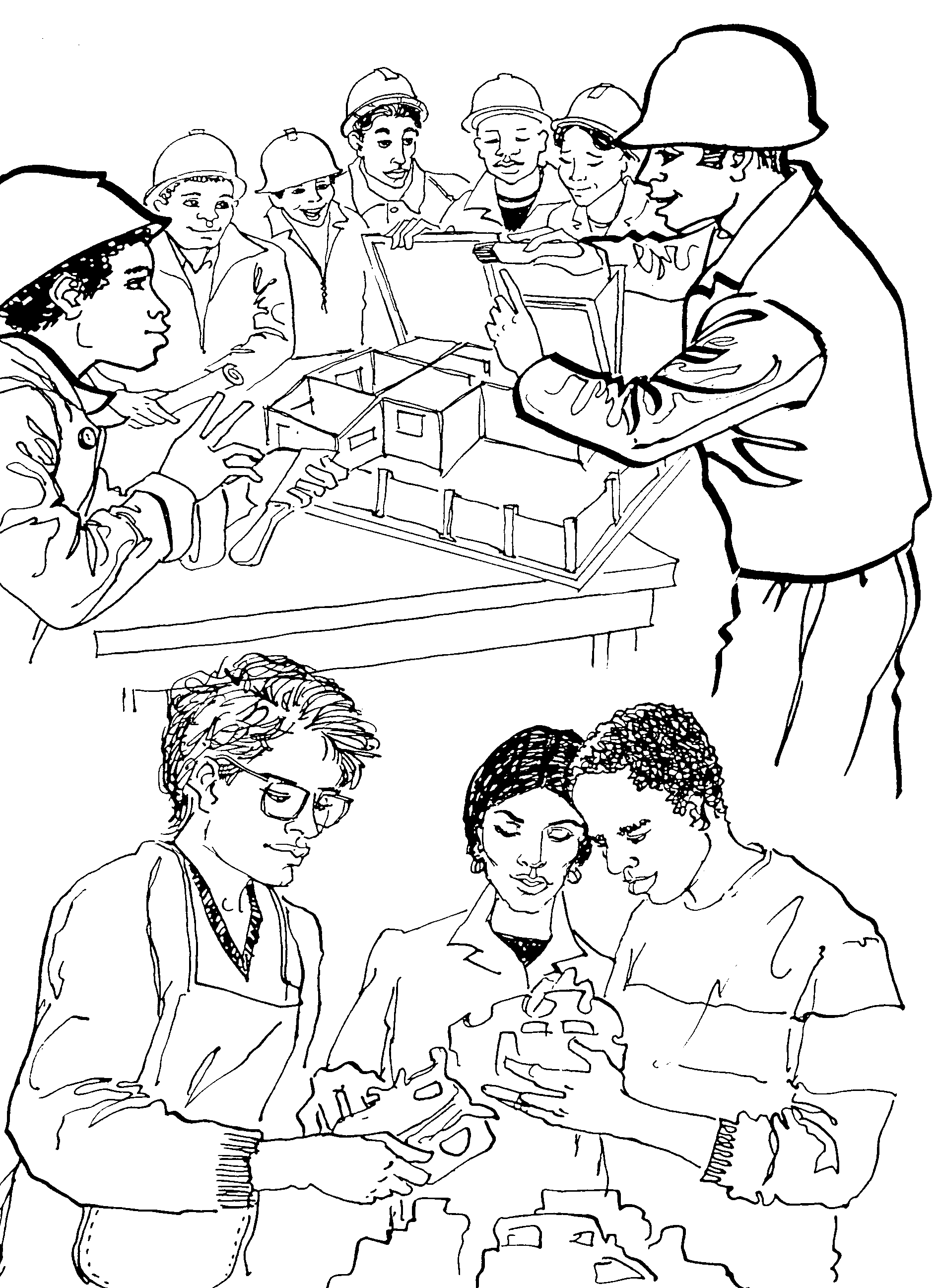
### Working in a Team

**How do you play the part of a successful team player? Easy, be there! Be there every step of the way. Commit yourself to be the best team player and never lose sight of your goals.**

**Being Successful Means**

**Working Together for the**

**Good of the Company**



It is important for each member of the team to understand and accept their role and responsibility in contributing to the group effort.

Ideally, the team should contain people capable of balancing these different roles. People are generally naturally suited to one role more than others, though they may have to take on another sympathetic role in order to balance the team.

Members of a team should take their responsibilities seriously, or they risk generating resentment from other team members. Team workers should:

* Maintain their customer service attitude, to treat their colleagues with respect
* Contribute fully to the team, while remaining open to others' ideas
* Be prompt when attending meetings and meeting deadlines

When working in a team, it must be realised that your own failures or poor behavior will affect everyone else on the team.

It is important for team members to be aware of the roles and tasks that other people are playing. This can be achieved by maintaining proper **documentation** of tasks and progress and by **mentoring** (one-to-one instruction).

This contributes to the rapport within the team, and in a practical sense, allows someone to take over in the case where a critical team member is ill or on vacation. It also helps to induct new members into the team, allowing them to contribute to the group effort more quickly.

### Tips for successful teamwork

* Know what the goal is you are working towards.
* Know the processes that have to be worked through before your task is completed
* Know what your tasks are and how you can interact with the other members of the group.
* Communicate with other team members: continuously: share ideas, suggestions and opinions to get input from team members.
* Remember you are part of a team and not working on our own.
* Listen to the suggestions, opinions and advice from other team members.
* Keep in mind it is not only your needs and input that count.
* Be aware of time schedules don’t delay the processes by too much talking or by procrastination.
* Always deliver your best don’t be counterproductive.
* Focus on the common goal you share and the fact that you have been tasked to achieve this goal.

### Where to start

* Establish measurements: what gets measured gets done.
* Commit to vision: A man’s reach should exceed his grasp
* There are no short cuts: It begins with participation and requires an attitude shift
* Behaviour change precedes attitude change
* Identify what you are doing now
* Plan changes deliberately
* Do it
* Get reinforcement
* Reflect on your successes
* Take credit. Celebrate your achievements

### Your Responsibilities As A Team Member

When you are working in a team each team member has to commit to the following in order to ensure the team functions effectively:

* Commit to work together in a team
* Commit to the goals and purposes of a team, find your place in the team so that you can also feel you belong.
* Ensure that all team members are travelling in the same direction – working towards the same goals and purposes.
* Take turns doing the hard jobs, it will benefit the team in the long run and therefore also benefit individual team members.
* Encourage, support and praise each other.
* Stand by each other and help each other in times of need.
* Support the team: the members of the team and the goals of the team.
* Remember that, to the outside world, you represent your team, so always represent your team well. When you hear about an athlete or member of a sport team that has misbehaved, it affects the way you on the outside view the team. This is also true of teams in the workplace.
* Be accountable for the actions of the team and the accomplishment of the team’s goals. In a soccer team, every member of the team has the responsibility to prevent the other side from scoring a goal. Similarly, every member of the team has the responsibility of helping their side to score a goal. In the workplace, this commitment is expected of every member of a team.
* This means that you, as a team member, have to make sure that you support the team and the goals of the team. If you dislike one member of the team or disagree with the goals, YOU have to overcome your resistance for the greater good of the team.

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### Individual Contributions To The Team

As a team member, you have certain responsibilities, as does each and every team member. This means that your contribution to the team effort should include the following:

#### Commitment

As a team member you have to be committed to the team’s efforts, if the team is to be effective.

Commitment is:

* Staking your reputation on the planned action
* No lingering doubts
* No looking back
* No contrary thoughts
* You should expect to win
* Nothing should be left undone
* If it’s to be done it must start with me
* You should be passionate about the outcomes
* You should have intensive loyalty

When a team outgrows individual performance and learns team confidence, excellence becomes a reality.

#### Support The Decisions Made By The Group

If you don’t agree, you have to find a way to support the decision, you have to make peace with the decision and go along with the rest of the group. By doing this, you will contribute to the success of the group and be able to share in the credit of the group’s success.

Accept that you are part of a team and that the team needs your support and cooperation for the team to be successful and reach the objectives that were set to the team.

What do you think happens to a soccer or athletic team if they all don’t work together and support each other? In the 2006 Commonwealth Games there was an excellent example of teamwork: the participants in the Discus and Javelin events the two competitors enrolled for the other one’s event in order to support each other. Athlete A’s strong point was actually the javelin, but he enrolled for the discus event as well, to support his fellow athlete, and vice versa. I call that excellent team spirit.

Did you notice how the rugby team supports the cricket team by attending their games and the cricket team does the same? Did you watch cricket the day that the producers and cast of the movie Tsotsi thrilled everyone by attending the cricket and then, during lunch time, paraded with the Oscar that the movie won? Wasn’t that wonderful?

That is what team spirit is about and in the end all of us were winners. We accomplish so much in this country when we work together, support each other and, when we win something, share it with everyone.

On the downside, if the team makes a bad decision or encounters problems, it is your duty to support the team in the efforts of sorting out the problem. The team as a whole must get involved in all the good things that happen in a team, but they must also work as a team to sort out and solve problems.

When a soccer or cricket player does not arrive for practice, his negative action impacts on the whole team. The team cannot practice and prepare for games properly if all the team members do not cooperate fully and the results can be seen in the way the games are played and lost.

You owe it to your team to give your full support, to take joint responsibility for the team’s successes and failures.

#### Team Rules

Another duty that every team member has is to abide by the rules set by the team. These rules should include:

* Rules for the behaviour of team members
* Guidelines regarding the carrying out of duties: every team member has to know how they should complete their duties, by when it should be completed and what the resources will be to assist the member in the completion of the duties.
* Team members should know what the parameters are within which they are to perform their duties: what are their responsibilities and what will they be held accountable for, what can they do on their own and which tasks will need assistance, information or inputs from outside sources.
* When team members are unsure of exactly what is required of them, who can they go to help them clarify these issues?
* All team rules, responsibilities and duties must be in accordance with the objectives set to the team. This sounds silly, but a soccer team must work together as a team in order to score goals to win the game. Each player in that team has certain duties and responsibilities and they have to know exactly what is expected of them. It is not the goalie’s duty to start the game by kicking off from the centre line, it is also not the duty of the goal scorer to arrange eats and drinks for the party afterwards, etc. Someone else who is not involved in the game can surely arrange the snacks for the party after the game.

Formative assessment SO2 AC 1 - 3

# CONTRACT WITH TEAM MEMBERS TO OBTAIN COMMITMENT

#### Specific outcome three

Contract with the team members to obtain commitment to achieve organisational standards

#### Assessment criteria

* Tasks, performance plans, targets and standards are discussed and agreed according to organisational requirements
* Time allocations for achieving individual and team objectives are agreed through a process of consultation

## Contract with team members

A team leader has to contract with team members to obtain commitment from team members in order to achieve the standards required by the organisation. The following has to be done when contracting with team members:

* Tasks, performance plans, targets and standards are discussed and agreed according to organisational requirements
* Time allocations for achieving individual and team objectives are agreed through a process of consultation

This means that you have to discuss the action plans with team members so that they clearly understand and agree with:

* Performance plans – what is expected of them
* Targets and standards – how much work is expected and to what standard should the work be done
* Within what time period the work should be finished.

We will now discuss some of these concepts, as well as how to negotiate with team members to obtain buy-in.

## The Standard Of Performance Required Of A Team

Before we explore a team and its dynamics, we need to know exactly what the team has to do, and know to what standards they have to conform, in order to successfully accomplish their task(s).

My trusted friend and companion, the evergreen *Oxford English Dictionary* defines **standard** as*.*

*.”* ***1*** *a level of quality or achievement.* ***2*** *a required or agreed level of quality or achievement.* ***3*** *something used as a measure in order to make comparisons.”*…

.there are more, but for the purpose of this unit standard, we will explore the three mentioned.

Think about these three different definitions. We can ask the following questions:

#### What is our current level of performance?

Establish the team’s level of performance by assessment according to company policy. Consider factors like team spirit, effectiveness of communication, conflict within the team, etc.

#### Does team performance level meet with company requirements?

Some standards, like safety standards are promulgated by law. These are the minimum requirements which must be adhered to.

It might happen that the company requires levels of performance exceeding those set in the standard. This will then be the standard of performance required by the company. These standards will necessarily be on level, or higher than those required by law. They can also change according to circumstances.

#### How does our level of performance compare with the set standard?

Compare established team performance levels with required standards. A team should always strive to operate on or above the set standard, as that is the minimum requirement.

Knowing what the set standard is, we can measure our team’s level of performance and compare it with the required and set standards.

If the team performs below the level of the set standard it calls for corrective and/or remedial measures to get the performance levels to conform to standards.

A plan of action has to implemented and followed through to remedy the situation.

In this action plan certain **goals and objectives** will be identified to guide and assist the team through the process.

Top management will normally set long term strategic goals. This gives a guideline of where the company wants to be in 6 – 10 years from now.

Middle management will break down the long term goals into medium term goals which will be more specific and allocated to specific departments or sections.

First line managers will in turn be allocated their share of medium term goals which they will then again break down into short term goals. These goals will be really **SMART**, as these short term goals will be set for the workers, who need to know exactly what is expected of them.

We now know all the details of what we want to achieve. The question now arises of HOW we are going to achieve these goals.

### Standards and objectives

Now that we know what standards and objectives are, we can identify the difference between the two.

**Standards** are the minimum requirements to *effectively* achieve a goal or an objective. These standards are set either by law or company policy.

Individual-, team-, section/department-, and ultimately company performance is assessed against criteria specified in the standards.

**Objectives** specify the actions necessary for the team to successfully and effectively execute the necessary task(s), performing within or above the set standards.

Those objectives that are repeatedly and easily reached will eventually become the new standards. As technology develops, so do standards change to keep abreast with current and future developments.

Every team that performs in such a manner that their efficiency enables them to achieve objectives regularly, thereby setting new standards, should consider themselves as pioneers, and take pride in the fact.

### Create a positive work environment

The following should give you an idea of how to create a positive working environment.

#### The Lesson Of The Geese

*Every year, just before winter, the geese in the northern hemisphere fly south for the winter. They always fly in a V-formation and scientists have discovered the reason why they fly this way. As each bird flaps its wings, it creates uplift for the bird immediately following. By flying in a V-formation, the flock adds at least 71% more flying range than if each bird flew on its own.*

**When we apply this to teamwork, we can say that people who share a common direction and sense of community can get where they are going quicker and easier because they are travelling on the thrust of one another.**

*Whenever a goose falls out of formation, it suddenly feels the drag and resistance of trying to fly alone and it quickly gets back into formation to take advantage of the lifting power of the bird immediately in front.*

**There is strength, power and safety in numbers when travelling in the same direction as others with whom we share a common goal.**

*When the goose in the lead gets tired, it rotates back in the formation and another goose flies in front.*

**It is worthwhile taking turns doing the hard jobs.**

*The geese from behind honk to encourage those in the front to keep their speed.*

**We all need to be encouraged with active support and praise.**

*When a goose gets sick or is wounded and falls out, two geese fall out of the formation and follow it down to help and protect. They stay with the goose unitl the problem is resolved and then they fly out on their own or with another formation to catch up with their group.*

**We must stand by each other and help each other in times of need.**

(Source: Lussier, RN. 1997, Management: concepts, Applications, Skill Development. Cincinnati, OH: South Western,pp418-419)



What we can learn from the geese and the other notes about teams and teamwork is that the team leader, as well as individual team members, can create a positive working environment by:

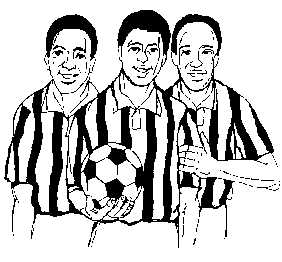
* Ensuring that all the team members share a common direction and sense of community – that they feel as if they belong
* Taking turns doing the hard jobs.
* Encouraging each other with active support and praise.
* Standing by each other and help each other in times of need.
* Realising that we may have different duties but we should all have the same purpose and the same destination
* Making sure that everyone is part of the decision-making process
* Supporting the decisions made by the group, even if we don’t always agree with it
* Commit to work together in a team
* Commit to the goals and purposes of a team
* Support the team: the members of the team and the goals of the team.
* Be accountable for the actions of the team and the accomplishment of the team’s goals

### Allocate work in a participative manner

When you are working in a team it is important that you discuss the allocation of duties and resources with your team members. By doing this you will make sure that you allocate the work to the best person and you will also obtain support for the action plan from your team. This means that you have to negotiate with team members.

### Negotiate short term objectives for a team

Negotiation is a process whereby two or more parties voluntarily discuss their differences and attempt to reach a joint decision on their common concerns.

It makes good sense that a supervisor discusses the goals and objectives with the team. The supervisor is ultimately responsible for the team’s performance, but that does not mean that he has to be an autocrat and force his own will on his subordinates. This will only serve to cultivate negativity among team members.

If the team members, on the other hand, have a say in the setting of objectives for the team it will inspire them do perform better, as they are now reaching objectives that they helped set in place.

When it becomes necessary to negotiate about the objectives being formulated, the following tips can help you in the negotiation process:

* Focus on the issues at hand – do not get sidetracked by discussing other matters, those can be discussed at a later meeting.
* Use objective criteria – work towards a solution that is based on principle, rather than pressure.
* Explore options for mutual gain – be creative and imaginative.
* Separate the people from the problem – do not allow personal relationships interfere with the problem at hand. Be hard on the problem and soft on the people.

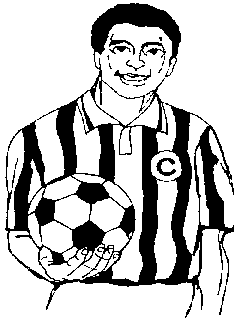
#### Characteristics of effective negotiation behaviour

* Treating the other person with dignity and respect.
* Clearly and honestly stating your position and the reasons for it.
* Letting the other parties tell their stories without interrupting or judging.
* Listening with your full attention and trying to understand.
* Conceding that the other party may be just as sincere as you are, and may be right on some issues.
* Acknowledging that your position may not be totally correct (or even reasonable) and that they were good negotiators and have arranged a fair deal.
* Giving feedback or responding, is a very valuable part of negotiation and needs careful handling.

Consider these suggestions on how to give feedback so that it causes the least possible damage:

* Focus on the behaviour, not the person.
* Share information and ideas, don't give advice.
* Be specific, not general.
* Explore alternatives, don't give answers or solutions.
* Discuss observations, not inferences.
* Be descriptive, not judgemental.
* Deal with the here and now and not with behaviour in the abstract.

### Identify Individual Roles Of Team Members

****Once it is agreed upon what has to be done (objectives), each individual team member must know exactly what is expected of him.

As mentioned earlier, the team leader needs to match individual attributes and preferences to the demand of team work. Use members in positions most suited to their specific talents or strengths.

On the other hand, he must also consider individual weaknesses and assess what, if any, effect these weaknesses might have on the performance of the individual as well as that of the team. Even people with weaknesses and disabilities can be of value to a team and can be utilised where their weakness or disability will not influence negatively on the performance levels of the team as a whole.

These specific duties of each team member can also be formulated in a job description.

### Ensure That Team Members Understand Their Roles, Responsibilities And Accountabilities

In order to make sure that the team works effectively together, we need to create high performance teams and the team leader must be able to lead the team.

### Team leader

* Put a framework in place that allows employee involvement and take action that encourage workers to give it a try
* Facilitate and lead discussions
* Encourage team members to consider a wide variety of alternatives when solving problems or making decisions
* When making suggestions to management collect all the data and facts
* Make sure the team is customer-driven
* Establish check point for monitoring progress and make sure that everyone adheres to them
* Do not criticize or scold team members in public
* Explain why hard work is necessary and why every team member’s effort is important to achieve objectives
* Do not complain
* Take the initiative
* Make positive suggestions
* When someone has an idea that you think won’t work, don’t ridicule the idea. Discuss the idea in a team by saying something like: let us discuss the advantages and disadvantages of the idea, or: how can we make this idea work
* Share your ideas with management and other teams
* Make sure you encourage team members and praise their good efforts
* Do not criticize team members for making a mistake
* Show a desire to listen
* Train team members in skills and knowledge needed
* Set priorities
* Treat others the way you like to be treated

To enable someone else to do the job for you, you must ensure that:

* they know what you want
* they have the authority to achieve it
* they know how to do it.

In other words, you have to communicate clearly the nature of the task, the extent of their responsibility and accountability , and the sources of relevant information and knowledge they need to do the job.

### Team members

#### pe03255_Your future is linked to that of the company

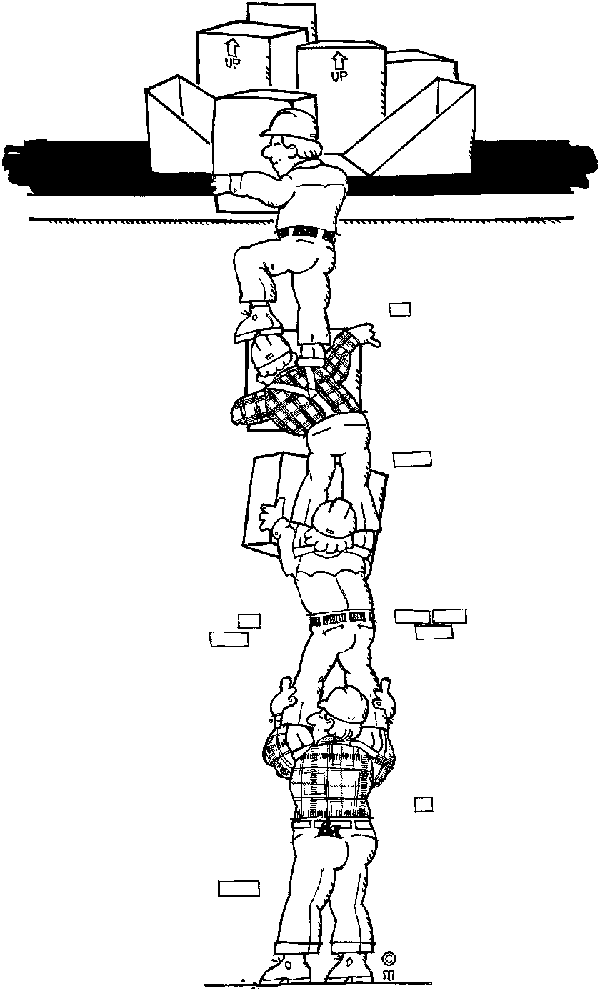
What is the impact on our lives when:-

* Things go wrong for the company
* Things go right for the company

It is the same as being in a boat. We sink and swim together.

We may have different duties but we should all have the same purpose and the same destination.

#### Participate in team decision making

When you are a member of a team or a group, your participation in discussions and decision-making is valuable.

Every team member is responsible for:

* Generating ideas,
* Collecting information
* Giving opinions
* Making recommendations

#### Process of making decisions

Whatever the method of decision-making that your team adopts, all the members have to ensure that the process of decision-making is followed:

* Define the problem
* Examine the facts
* Select the optimum decision
* Formulate the decision
* Communicate the decision
* Evaluate outcome

Each team member has a role to play during the decision making process and the implementation of the decision:

* Some team members will be responsible for collecting information. Ensure that the information you collect is as complete as possible and that the information is relevant to the decision that has to be made. Remember that an informed, good and effective decision can only be made if all the information is available.
* Every team member should make a contribution towards the making of a decision: your ideas, recommendations, and any extra information you may have can contribute to the team making a good decision.
* Make sure that your opinions are objective: do not let your personal feelings about a person or a subject influence your decision. For example, just because you do not like a person does not give you the right to disagree or to vote against that person’s opinion. Similarly, just because you do not like an idea, does not mean that it will not work. You owe it to the team to put personal prejudices to one side when contributing to team work.

#### Team decision making

There are a number of ways to enhance the creativity of the team decision-making process:

* PEOPO005Announce the meeting in advance. Define the issue to be discussed, and invite participants to come prepared with ideas and possible solutions.
* Use a round robin to collect people’s ideas. Go around the room and ask people, one by one, to mention the ideas or solutions they’ve developed. List them on a flip chart or a whiteboard. During the round robin, there is to be no criticism or evaluation.
* Encourage people to discuss the ideas with the group. Once it is on the table, the idea is a group issue, to be dealt with by the group.
* Rephrase criticism in a positive way. A frequently negative comment is “we tried that and it didn’t work” A helpful response could be “what’s in this version that wasn’t in the one that we didn’t fly?” or “How have conditions changed to encourage us to retry the ideas?”
* Ask for positive remarks from negative people. When negative comments proliferate, create two columns, “pro” and “con”, on the flip chart. Then ask each person who has made negative comments to put his/her objection in the “con” column, and then something for the “pro” side.
* Set an example by not defending your ideas. When your idea is criticised, you may feel a protective instinct. Let others carry the ball. Remind the team that your idea is a group issue. If they misunderstand what you’ve proposed, clarify it, but don’t defend. Others will catch on and emulate your behaviour.

Formative assessment SO3 AC 1 – 2

# MONITOR PERFORMANCE

#### Specific outcome four

Implement, monitor and evaluate performance against team objectives and organisational standards

#### Assessment criteria

* Agreed plans are implemented according to Standard Operating Procedures
* Potential difficulties in achieving the plan are anticipated through reflection and feedback
* Team outputs are monitored against agreed targets and time allocations
* Variances to required outputs are identified and corrective action is taken where necessary

## Implement plans

You and your team have, through consultation, developed action plans. Now it is time to implement these action plans.

Plans do not mysteriously activate themselves. You must put the plans into effect.

Planning, no matter how carefully and painstakingly done, is useless and a waste of time without commitment and action.

* This means that you have to start doing the things that must be done according to the action plan, or see that the people who must do it, are doing it.
* Then you have to check on a regular basis whether the tasks in the action plan are still being done and whether they will be finished on time.
* If things are going wrong, you need to know in time so that the problem can be solved.

An action plan is like a map. It helps us work out what we must do to meet our goal.

**In order to implement the action plan you have to do the following**

* you have to delegate tasks to the individual team members
* you have to encourage each team members to complete the tasks using their own control methods
* you have to make resources available so that the team members are able to complete the tasks
* you have to monitor the activities of the team members to make sure that they are complying with the action plan

### Standard operating procedures

When implementing the action plan, it always has to be done in line with the Standard Operating Procedures of the organisation, in other words you have to do the work the way the organisation wants you and your team to do it.

A Standing Operating Procedure: A set of instructions covering those features of operations which lend themselves to a definite or standardized procedure without loss of effectiveness

Standard operating procedures (SOP) are usually contained in an SOP manual. This manual typically describes the standard operating procedures (SOPs) followed for various business processes within an organisation

**Its main objectives are:**

* To systematically record all current business policies, processes and procedures currently followed
* To clearly indicate the flow of actions performed from beginning to end of the process chain
* To inculcate a culture of “CONTROL CONSCIOUSNESS” among process owners and operatives
* To observe shortcomings in these policies, processes and procedures and make suitable recommendations for improvements in the policies, process effectiveness, process efficiency, internal controls and compliance, as applicable, and
* To serve as a basis for disseminating knowledge on the above among employees dealing with the relevant business functions, to enable adequate training to be imparted to concerned personnel with a view to making the business operations person-independent.
* To act as a reference guide for Internal Audit, which assesses the extent to which the SOP is complied with.

**Organization Structure**

This is a macro organization chart showing the hierarchical or reporting relationships in the organization or business unit for which the manual is prepared.

**Summaries of Business Processes**

Each business process (such as procurement, sales and marketing, planning, quality assurance, production, maintenance, etc.) is summarized, and each summary could contain the following information:

* Objectives of the business process
* Micro organization (functional) structure chart
* Duties and responsibilities of each designated person involved in the process
* List of tasks performed
* Summary of Recommendations

The summary of recommended policies and procedures (e. above) lists, for each business process, its risks/shortcomings, and the recommended practice, with its expected benefits. Indicate along with each recommended practice the area of improvement envisaged (Efficiency / Effectiveness / Control / Compliance).

**Detailed Chapters for Each Business Process**

Each business process has a chapter containing the following sections:

* Objectives of the business process
* Summarised Block Diagram of process flow
* Detailed Process Flowchart
* Outputs and inputs of each step in the process to clearly bring out the inter-dependencies between various functional units in the organization and between the organization and its internal and external stakeholders (customers. suppliers, etc.)
* Detailed textual description of process steps in strict logical sequence. The steps would include both computer-based and manual procedures and are to be described precisely and in the correct sequence. The text and the detailed process flowcharts should match.
* The description in e. above should include descriptions of procedures to handle exceptions, i.e., exceptional but anticipated events.
* Internal controls employed in the procedures to ensure that they are correctly and completely executed. Internal controls may be built into computerized business application systems such as ERP systems (like data entry, document preparation or report generation) or may be administrative controls exercised in the non-computer procedures of a business process.
* Recommendations to improve the effectiveness, efficiency, control or statutory compliance of policies, processes and procedures which would replace the current policies, processes and procedures if accepted by users (if thought essential, desirable or practical, as applicable) after intensive discussions.
* Exhibits of documents, reports, computer data entry screens, manual registers, etc. that are referred to as inputs to and outputs from specific procedures
* Accounting flow clearly showing which financial accounting general ledger accounts are operated wherever specific business transactions need to be recorded in the books of account.

## Anticipate problems

No action plan ever runs smoothly and exactly according to plan. Part of the duties of the team is to also anticipate problems that may occur. This is done through reflection about possible problems as well as feedback on the progress of the action plan.

One technique you can use to reflect about possible problems is to do a SWOT analysis.

### SWOT analysis

SWOT is the name given to the analysis of Strengths, Weaknesses, Opportunities and Threats of an organisation. A SWOT analysis is usually done as part of the strategic planning of an organisation and is used to help determine the goals and objectives of the organisation.

Most of the information used in the SWOT analysis is obtained from marketing and market research. Organisations and businesses use marketing research to keep in touch with the needs and wants of their consumers.

When doing a SWOT analysis, you identify and describe the strengths, weaknesses, opportunities and threats to the organisation.

Strengths and weaknesses are **internal factors** which affect the business in a positive or negative way. Opportunities and threats are **external** factors in the environment that influence your business.

#### Strengths

* Knowledge of the products and the business. Since your organisation provides the product or service, the employees should have a very good knowledge of the products or services that you provide.
* A good location for your business. The closer you are to your customers, the more convenient it is for them to buy from you.
* Little effective competition. If your business is in a location where there is little competition, it is definitely a strength, since customers would prefer to buy from you, if your location is closer
* A good product or service is always a strength
* A pleasing manner towards customers and potential customers

#### Weaknesses

* Inexperience in the business
* Lack of business skills
* A poor location for the business
* Too much competition
* No demand for the product

#### Opportunities

* These are business opportunities that you can identify. You may identify an opportunity for a product or service that has not been offered before, particularly in the area where your organisation operates. If no one is selling soup in winter in your area and you happen to be in the fast food market, this is an opportunity.
* The sales or marketing personnel may have identified a new product or service for which there is a need. If you are a training company, including HIV/AIDS training in your products is an opportunity, since there is a big need for this kind of training today.
* These may come about through an awareness of the economic situation, such as a high petrol price that creates a need for smaller cars that use less petrol.
* Low interest rates causes people to buy bigger houses, while high interest rates will have the opposite effect.
* Hotels and guest houses are built close to airports and near tourist attractions to make it easier for tourists and travellers to sleep over.

There are many threats to a business, some brought on by the environment, others through a lack of control of the business. The main threats are

#### Threats

* Economic depression. High interest rates results in less spending by consumers.. You need to know this so that you can change your range of products or services to suit the needs of the consumer.
* Population movement away from the location.
* Unemployment poses a threat to a business. If a mine closes down, for example, thousands of people suddenly have less money to spend. This will impact negatively on any business.
* Product depreciation. When consumers stop buying your products, this is a threat to the organisation that has to be identified very quickly. You need to find out what they are buying instead of your products and why they are not buying your products anymore. Businesses that are very vulnerable to this kind of threat are business that are in the catering industry. If you serve bad food to consumers once and it is advertised in the media, your business will suffer. Consumers would go to a competitor to satisfy this need.

Of course, there are many more strengths, weaknesses, opportunities and threats than those that were listed.

### Contingency plans

Now that you know what the possible threats to the team and also the weaknesses inside the team are, you can take steps to minimise the threat and to address the weaknesses in the team.

Contingency plans are made in order to minimise threats – contingency plans are a second and a third plan of action, in case anything goes wrong.

For example, you have to get to work every day and your first action plan is to drive your car. One morning you get to the car and the car won’t start, or you have a flat tyre and no spare tyre to use. You need a Plan B (a contingency plan) to get to work – take the bus, take a taxi, get a lift from a friend or family member. Without a contingency plan, you will not be able to get to work at all.

The best type of contingency plan is the one that prevents the threat from occurring, in other words make sure that you have a spare tyre that is inflated by checking this every morning or afternoon.

## Monitor Progress

Note Control is the process whereby management ensures that the work activities fit in with the goals and objectives.

If you have to control the work activities, it stands to reason that you have to know what you have to control – the specific work process, how you will know if the work is being done correctly and how you will know if there are errors in the work process.

During the planning process you did an action plan where you specified who does what, when it should be done, how it should be done, etc. During the control phase you have to make sure that everyone, including yourself, is doing what they are supposed to be doing, to the correct standard, in time, so that your team will meet the goals and objectives.

Everything you do at work is aimed at achieving the goals and objectives of the organisation. Top management makes strategic plans and middle and junior management have to implement tactical and operational plans in order to achieve the goals and objectives as set by top management in the strategic plans.

For example, the top management of a car manufacturer such as BMW or Nissan may have as part of the strategy of the company to produce 5000 Light Delivery Vehicles (bakkies) but it is up to the employees in the production line to actually ensure that 5000 LDV’s are produced for the year. Similarly, your organisation obtained a tender to provide, for example, public transport in the Gauteng area. Now it is up to middle and junior management to ensure that the public transport is delivered in terms of the tender, so that the goals and objectives of the organisation is met.

In effect, this means that when you develop an action plan for your section, you are operationalising that part of the strategic plan of the organisation that applies to your section or department.

### Establish Standards Of Performance

The actual performance should be the same as the planned performance. So, the standards of performance are determined during the planning phase. The standards have to be realistic, attainable and measurable to ensure that the actual performance and the planned performance are the same.

I can compare this to baking a cake or planting mealies. If you have to bake a chocolate cake for a function, and you bake an orange flavoured cake instead, you have not performed according to the planned standards. The cake might be perfect, but a chocolate cake was required, not an orange flavoured cake. If you planned on planting mealies and you plant sunflower or peanuts instead, you have not performed according to the standards. The standards required you to plant mealies.

Note The purpose of control is to ensure that mistakes do not happen and, if they do happen, that you can recognise the error in time to do something about it.

You need to realise that you are baking the wrong cake before the cake has been baked and is ready for icing. You have to realise during the mixing of ingredients or the pouring of the mixture into the pans that you are doing the wrong thing.

The same principle applies with the planting of mealies – when you only realise at harvesting time that you have planted sunflowers and not mealies, it is a bit late. The sooner you realise you are doing something wrong, the better. This is the purpose of control.

#### Measure actual performance

The performance variables must be measurable against the standards of performance and they must be reliable. The methods of measuring performance must be specified and must take place at specific times during the work process.

In other words, when planting mealies you have to make sure that you have the right seeds before planting, you have to check what the plants look like at a certain height – do they look like mealies, etc. when baking a cake, who checks that the right ingredients are being used, who checks the colour of the batter, who tastes whether it taste like chocolate cake, and so on.

### Evaluate Deviations

When there is a difference between the actual performance and the planned performance, the difference is analysed. What are the deviations, what caused them and what should I do to put it right?

You have now determined that you are baking an orange flavoured cake and not a chocolate cake. How did this happen, what systems can you put in place to ensure that it does not happen again and what can you do right now to remedy the situation?

You have to explore everything that could be responsible for the deviation during the evaluation process, to ensure that an error does not slip in again without you noticing. You also need to know all the causes of the error in order to work out a plan to take corrective action.

### Take Corrective Action

This is the action you take to correct the difference between the standards of performance and the actual performance – how you are going to fix the problem so that it does not happen again.

What are you going to do with the batter of the orange flavoured cake: are you going to bake the cake and try to sell it to someone else, are you going to make fairy cakes (little cakes each in their own paper cup) out of the batter, are you going to add cocoa and sugar to the orange flavoured batter and sell it as an orange flavoured chocolate cake? What are you going to do in future to ensure that this does not happen again?

Once you have worked out the corrective action to be taken, you must implement the action and then start the control process all over again.

## Measure Performance

Performance can be thought of as Actual Results vs. Desired Results.

Any discrepancy, where **Actual** is less than **Desired**, could constitute the performance improvement zone. Performance management and improvement can be thought of as a cycle:

* Performance planning where goals and objectives are established
* Performance coaching where a manager intervenes to give feedback and adjust performance
* Performance appraisal where individual performance is formally documented and feedback delivered

A performance problem is found any time there is a discrepancy between the sought-after results and the actual results. This can occur at various levels:

Performance problems include:

* individual performance problems
* team performance problems
* unit (e.g. department or division) performance shortfalls

There are many causes of performance problems including:

* interference with the person while completing their tasks
* attitude – the attitude of the team member and/or the team leader
* skills – a lack of skills and knowledge

Performance improvement is any effort aimed at closing the gap between Actual Results and Desired Results.

Every person gets a job description, giving details of what that person is supposed to do and how it should be done. Furthermore, the operations manual will also give full details of the correct procedures and processes that have to be followed in the organisation.

If you have to control the work activities, it stands to reason that you have to know what you have to control – the specific work process, how you will know if the work is being done correctly and how you will know if there are errors in the work process.

During the planning process you did an action plan where you specified who does what, when it should be done, how it should be done, etc. During the control phase you have to make sure that everyone, including yourself, is doing what they are supposed to be doing, to the correct standard, in time, so that your team will meet the goals and objectives.

Everything you do at work is aimed at achieving the goals and objectives of the organisation. Top management makes strategic plans and middle and junior management have to implement tactical and operational plans in order to achieve the goals and objectives as set by top management in the strategic plans.

All the managers will get objectives and goals in the form of tactical plans. The tactical plans will give details of how much of a product must be produced or how much of a service must be delivered. For example, if your organisation is manufacturing car spare parts, that are delivered to customers, one section will get a target of how many of a specific part must be manufactured per day, per week and per month. The quality of the parts will also be specified and the conditions under which the parts must be made will also be noted.

The section or department responsible for deliveries will get delivery targets: how many spares must be delivered to which customer on a daily or weekly basis

The supervisor will take this tactical plan and turn it into a operational plan that will tell each employee what he has to do for the day, week and month, thereby making sure that the targets of the section are met.

If the section does not make as many deliveries as required, there is a problem that has to be investigated and solved.

* if all the deliveries are not made as scheduled, there is a problem
* If there are deliveries that are incorrect, there is a problem
* If goods disappear while in transit, there is a problem
* If more km are driven than scheduled, there is a problem
* If the vehicle uses too much fuel or oil, there is a problem
* If the section works too much overtime to meet deadlines, there is a problem.
* If there are too many fights between employees there is a problem.

These are just some of the ways that performance is monitored and measured. When an organisation produces products or delivers a service, it means that the work of one employee depends on the speed and quality of the work that another employee produces. If one employee is not doing his bit to ensure that the work is done quickly and of the quality and quantity that is required, it will impact on the entire section, the entire department and also on the entire organisation.

### Assessing the performance of individual team members

Regular feedback should be given on performance and when feedback is given regularly it becomes a major motivational tool.

#### Recap on the objectives set at your previous meeting

One needs to have something to talk about. Standards of performance and objectives are good building blocks in an assessment interview.

#### Ask the employee to tell you how far he has progressed with his projects and give recognition for achievements

Ask the employee to give feedback rather than telling him how you think he has done. This will enable you to see where he puts his emphasis. Recognition is an extremely important motivational tool - avoid saying You have done well ... But!!! .

#### Ask for and listen uncritically to his explanation of why the targets were not met

Listen openly. You may discover that there were some very real problems facing the employee..

#### Ask for his suggestions for completing the projects.

He will be more committed if he suggests solutions to his own problems. It must be important for him to realise that the tasks in the action plan must be completed.

#### Tell him where you consider he can improve and express your confidence in his ability to succeed, building on strengths

Take care to build the individual rather than break him down. It is in your interests as a supervisor/team leader to see that he succeeds.

#### Together set new objectives and ask if there is anything else he would like to achieve

The key word here is together. You are discussing your employee's job and his future, so he must be involved. By asking him if there is anything else he would like to achieve and you may discover areas of concern of which you were unaware.

#### Ensure employee's acceptance of his objectives and standards of performance and agree on follow up dates

Before closing the interview ensure that you are both in accord with what has been discussed. If the employee has only paid lip service to what has been discussed the chances of him attempting to meet the objectives are very slight.

### Feedback skills

When a project team member is not performing satisfactorily, correct action also has to be taken and feedback given to the team member about his/her performance.

Providing effective feedback is one of the core skills required of a project leader when supervising team members. This section will explore effective ways of not only providing feedback, but receiving feedback so that it becomes a developmental experience, for both the team member and leader.

#### Ways to give positive or negative feedback effectively

1. Before giving feedback – question your motive. If your motive is to show that you are better than the person or to put the person down, refrain from giving the feedback. Only give feedback if you consider the outcome to be developmental to both parties.
2. Give feedback close to the event so that the experience remains fresh in both parties' minds.
3. Ensure that the feedback is specific. Use specific statements like, "The point that you made on taking ownership of projects to ensure project sustainability is very important, because …" rather than vague statements, like "good" or "well done", etc. Refer to specific situations or examples like, "The report needs to be more detailed, similar to the report you wrote on poverty alleviation projects in the Northern Cape", rather than "This report in too vague". Avoid using broad generalisations, like 'always', never', etc.
4. Observe and listen actively to the receiver when giving feedback. Observe the receiver's body language to assess the extent to which the feedback is being received. Adjust your feedback to ensure that the channels of communication remain open.
5. Keep feedback impersonal. Focus on the act or the deed, not the individual. For example, “coming late to work everyday, has the following effects on other staff …” instead of “Because you are always late, you demotivate everyone around you”. Never attack a person personally or ridicule the person. For example, "don't be stupid" or "you are such an idiot" or "that was a dumb thing to say"
6. Don't make assumptions. Don't assume that the person agrees with you because he/she nods his/her head or says that he/she agrees. Check out your assumptions, by asking the person's opinion on the issue and assessing whether the body language (facial expressions, gestures, postures, movements, voice, etc.) corresponds with what the person is saying. If you are sure what the person is thinking or whether the person share a similar understanding, ask the person a straight question like, "I need to make sure that I am making sense, what do you understand by what I have just said?"
7. Be open to criticism. If the receiver disagrees with your comments, listen attentively and find out why the person is feeling this way. If you come across defensively, the likelihood of the person taking your feedback seriously is slim.
8. Keep the feedback process short and simple.
9. Be goal-oriented where both of you establish realistic goals to improve the situation.
10. Try to ensure that the receiver is receptive to receiving feedback and 'invites' it.
11. Try to be in a calm and confident frame of mind when giving feedback.
12. Do not insist that your feedback is the absolute truth, or that the receiver is compelled to accept it.

### Receive feedback

In a team, you must not only be able to give feedback, you must be able to receive feedback as well. If you feel panic when you receive feedback it is most probably because it sounds like criticism.

Most of us are sensitive to criticism and it probably originates from the ‘blanket criticism’ we receive as children: “You are clumsy…, rather than: “That was a clumsy thing to do…”

Remind yourself that making one or even a series of mistakes does not mean you are a bad person. It means you are a normal person who made a few mistakes. Contrary to what we were taught as children, human beings learn through making mistakes. So, when you make a mistake it confirms that you are a member of the human race.

If you receive ‘blanket criticism’ now as an adult, “don’t like your attitude…”; “You’re always difficult about this kind of thing…”, use the **fogging technique** to find out the specifics about what the person wants to say.

Defuse the situation by:

* Not arguing with the criticism as this would ‘add fuel to the fire’. Rather say thinks like, “maybe I am…”; “perhaps it is…”, etc.
* Ask for more specific feedback. “Can you tell me exactly what bothers you…” “Can you tell me more about what you feel has gone wrong?”
* Continue **fogging** until you hear a specific ‘criticism’ that you can begin to deal with, as per the example below:

*“I don’t like your attitude when you are dealing with clients.”*

*“Perhaps my attitude to clients does need looking at. Can you tell me a bit more about what bothers you?”*

*“It’s just you, your attitude.”*

*“Can you tell me what it is about my attitude that bothers you?”*

*“It’s the way you dress.”*

*“Maybe there is a problem with the way I dress. Can you tell me what exactly you are concerned about?”*

*“It’s too casual.”*

*“Perhaps I do dress too casually. Could you say what it is that strikes you as too casual?”*

*“I just don’t think it’s appropriate for women professionals to wear ……… when they are interviewing clients.”*

It took a while but now you know what the **real issue** is.

**Accepting valid feedback assertively involves**

* Reminding ourselves that one mistake does not mean that we a re a total failure
* Repeating the ‘criticism’ back to the critic to show that you have heard it clearly and accept it:
* *‘I agree. I have made a mess of this project.’*
* *‘Yes, you are right. I should not have lost my temper with that client.’*
* *‘Yes. I did rush through the points too fast at the meeting.’*
* Apologise if you want to but keep it short. Don’t go on and on.
* ‘I’m sorry that I was rude. I was under a lot of pressure that day but I realize that is no excuse.’
* When you have clearly accepted and ‘owned’ the feedback you might want to add a positive sentence looking at how things might be improved.
* *‘I agree. I have made a mess of this project. Can you suggest what we can do to start recovering the situation?’*
* *‘You are right. I should not have lost my temper with that client. What do you think is the most effective way of apologizing and regaining his trust?’*
* *‘Yes, I did rush through the points too fast at the meting. I’m working on my tendency to panic and rush in meetings. I think I am slowly starting to improve.*’

Accepting a valid ‘criticism’ calmly and looking straightaway for opportunities for constructive action will usually keep the whole situation calm and positive, rather than it becoming a source of conflict and distress. Furthermore, you retain your power and personal dignity more effectively than resisting a criticism you know in your heart is true, simply because your ego gets in the way.

**You do not have to agree with invalid ‘criticism’. ‘No, I don’t agree with that. I have not been unreliable. My monthly reports are always on time and accurate.’**

Formative assessment SO4 AC 1 -