HERRMANN® TEAM EFFECTIVENESS DASHBOARD

Facilitator Guide

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How to Use this Guide

Herrmann® Team Effectiveness Dashboard includes all the tools and materials you need to gather, analyze and share team perspective. This unique diagnostic also allows for repeated uses by the team over time to measure improvement and ensure continued alignment once it's achieved.

PLEASE REVIEW THIS GUIDE BEFORE USING THIS DIAGNOSTIC!

The contents of this guide are for YOU, the facilitator. It includes activities and worksheets that you will print out for use during team discussion, but this document is your guide to running the survey, analyzing the results, and leading team discussion and activities.

Recommended activities before administering your Herrmann® Team Effectiveness Dashboard:

- Read this document thoroughly
- Familiarize yourself with the process of sending invitations in Axon
- Familiarize yourself with generating the Team Effectiveness Dashboard report in Axon
- Review the sample report provided along with the interpreting the report section in this document
- Ask your CSM for support if you have any questions

Overview

WHAT?

The purpose of the Herrmann® Team Effectiveness Dashboard is to encourage team members to think about their team's current functioning and how they could work together more effectively.

Team members are asked to rate the amount of focus (from very low to very high) the team places on a number of Whole Brain® areas, as well as the amount of focus they think the team should be placing on each area. The questions in the survey relate to the areas in each quadrant that contribute to the effectiveness of a team overall.

Once each team member has completed the questionnaire, the summary report outlines how much focus the team members place on the various Whole Brain® areas that make a team successful.

Since this is an evaluative tool, the process can and should be repeated throughout the course of a team's development, allowing them to compare the shift or change in team focus and improvement in alignment.

If used in team meetings, the team can also compare how the results relate to the team's preferences—but please note that this is not a team *preference* profile or report.

HOW?

(See next page)

WHY?

Having an objective process to evaluate team dynamics and create healthy conversations for continuous improvement is critical for team effectiveness and growth. The Herrmann® Team Effectiveness Dashboard is a tool designed to help teams evaluate what they are focusing on and what they may be missing, all by leveraging and applying the Whole Brain® model.

As a neutral place to voice opinions about the team's dynamics, it allows and encourages team members to contribute their ideas on "what we do now" and "what we think we should be doing." All responses are anonymous.

With the ability to analyze and evaluate the perceptions of individual members and make comparisons to the HBDI® Team Profile, the Herrmann® Team Effectiveness Dashboard will give you insights to help you work with the team to define or clarify their desired outcomes and objectives. You can also explore areas of alignment, future implications and opportunities for the discussion and planning of tasks the team will be required to complete.

WHO?

The Herrmann® Team Effectiveness Dashboard is perfect for newly formed teams or existing intact teams ranging from 4 to 10 members, with up to 20 members maximum. Every team member, including the manager or supervisor, must complete the 37-question survey prior to attending a team discussion and review of team results.

Overview

HOW?

The Herrmann® Team Effectiveness Dashboard can be incorporated into a variety of team development and effectiveness processes. Delivery options include:

- At the beginning or end of the year to create a team development plan
- When a team receives new goals and objectives, or is combined with another group
- With a change in leadership or key members
- As a next step after the HBDI® Team Profile.

Delivery at a Glance

Email Survey to Team	Use Axon to administer the Herrmann® Team Dashboard survey to the entire team.
Team Completes Survey	Each member of the team completes the survey. It's your responsibility to follow up with team members and ensure that they complete it by the deadline. Note that all survey responses are kept anonymous.
Report Generated	After the team has completed the survey or the deadline has passed, you may download the full Herrmann® Team Effectiveness Dashboard report from Axon.
Facilitator Debrief	Present the report and your insights and facilitate a discussion with the team. Use the worksheets and activities to help the team understand areas of alignment and discordance, create an action plan and schedule a follow up survey and meeting.

The process

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Team Effectiveness Model

The four-color, four-quadrant graphic is a registered trademark of Herrmann Global, LLC.

The Herrmann® Team Effectiveness Dashboard uses the Whole Brain® Team Effectiveness Model (shown above) as the foundation of its diagnostic survey, with each area evaluated by each participant.

Participants are also asked to respond to the following open-ended questions, with the aim of providing a view of the current and envisioned operational state of the team from the perspective of all of its members:

- What are the purpose and goals of this team?
- Is this team working to its maximum potential?
- What are the strengths of this team?
- What do you see as the biggest challenge facing this team?

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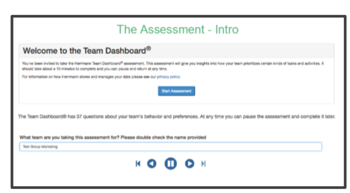
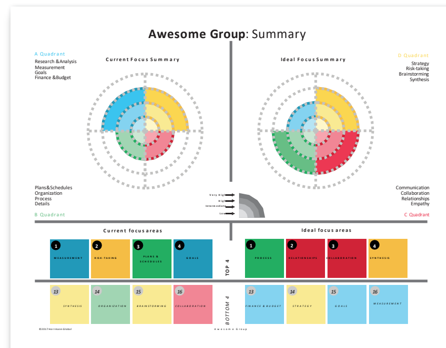
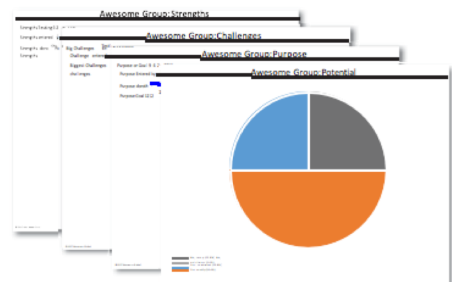
Survey Process

Activity	Description	Show/Display/Use
1. Invite team to complete survey	REQUEST the Herrmann® Team Effectiveness Dashboard by purchasing a license via your Herrmann International representative. Upon receipt of a license for the Herrmann® Team Effectiveness Dashboard will be added to your Axon Practitioners License. You will then be able to create a new invitation for the team members by: · Clicking the **New Invitation** button in the upper right corner of your Axon for Practitioners window. · In the Invitation Details section, enter the team name and team members' email addresses. · In the Products section of the invitation, selecting "Team Effectiveness Dashboard" from the list of available surveys · In the Reminders and Messages section, setting a deadline for the completion of the survey. Note that you may also customize the timing and wording of the reminder message that the recipients receive. Once you've completed the invitation, team members will receive an email with detailed instructions on how to complete the survey.	AXON THINKING ANALYTICS PLATFORM
2. Team Completes Survey	Team members anonymously complete the survey (typically less than 15 minutes). You will be able to track completion of the survey by each member and send reminders from within Axon.	

Reporting Process

Activity	Description	Show/Display/Use
3. Report is Generated In Axon	Once all team members have completed the survey, you are ready to prepare the report. Select the group, then select the Team Effectiveness Dashboard Report packet and create your PDF. You can then download it from the Axon system. Note: Results are not distributed automatically to the team. See the Interpreting Results section of this guide for a detailed explanation of how to read and interpret each section of the report.	 

Delivery

Activity	Description/Learning Objectives	Show/Display/Use

4. Practitioner facilitates discussion

DISCUSS feedback directly with the team. If you know the team's HBDI® profile, keep the preferences in mind as you facilitate discussion.

NOTE: It is important that the team members feel their opinions have been voiced and acknowledged.

USE the Investigation Questions and Team Effectiveness Worksheet and on the following pages to help team members consider the current level of focus the team places on the specific Whole Brain® areas and the implications on its function.

PRINT these resources from the reproducible masters included in this guide and hand out to the team.

USE the Herrmann® Team Effectiveness Dashboard in conjunction with the HBDI® Team Profile to match the perceived operational style of the team with the thinking preferences. Note: If the team is not familiar with Whole Brain® Thinking it is recommended that you use the Diversity Game to introduce the model and key concepts. You may also want to include a few introductory slides covering basic concepts so that the team is comfortable with the quadrants and color coding.

Leave the team discussion with a clear commitment to the ACTION PLAN. Ensure that the team has copies of the plan. Check in regularly with the team on progress and schedule a second delivery of the survey and discussion in a few months. Depending on the team goals, one survey and meeting per quarter is recommended, but no less than twice a year.

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Investigation Questions

How to analyse the Whole Brain® Team Dashboard

1.What are your key observations and insights?

2. Where do you notice more or less alignment? Why might there be more or less alignment?

3. Which Team Effectiveness areas are most relevant for this particular team?

4. Are there qualities that do not relate to this team's function?

5. Look at the distribution of scores. Are they spread out or clustered together?

6. Which quadrants or descriptors are high focus areas (above the mid point of 3)?

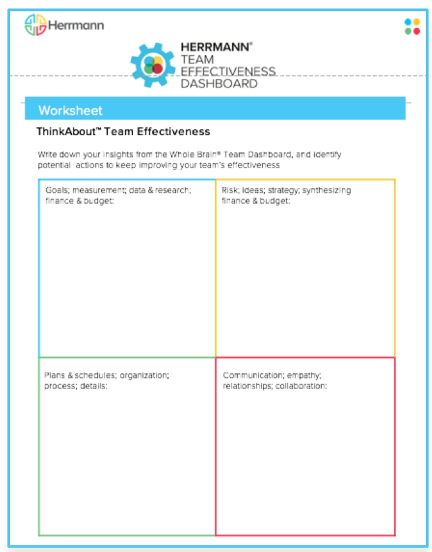
7. Which quadrants or descriptors are low focus areas (below the mid point of 3)?

8. Which quadrants or descriptors are on the mid point (3)?

9. What are the implications of this data for the team?

10. What comment/s would you make about how the team sees itself?

11. What is the relationship between these insights (how the team members perceive the team) and the HBDI® Team Profile (how the team members percieve themselves)?



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Worksheet

ThinkAbout™ Team Effectiveness

Write down your insights from the Whole Brain® Team Dashboard, and identify potential actions to keep improving your team's effectiveness

Goals; measurement; data & research; finance & budget:	Risk; ideas; strategy; synthesizing finance & budget:
Plans & schedules; organization; process; details:	Communication; empathy; relationships; collaboration:

Interpreting the Results

Interpreting the Results Summary Page

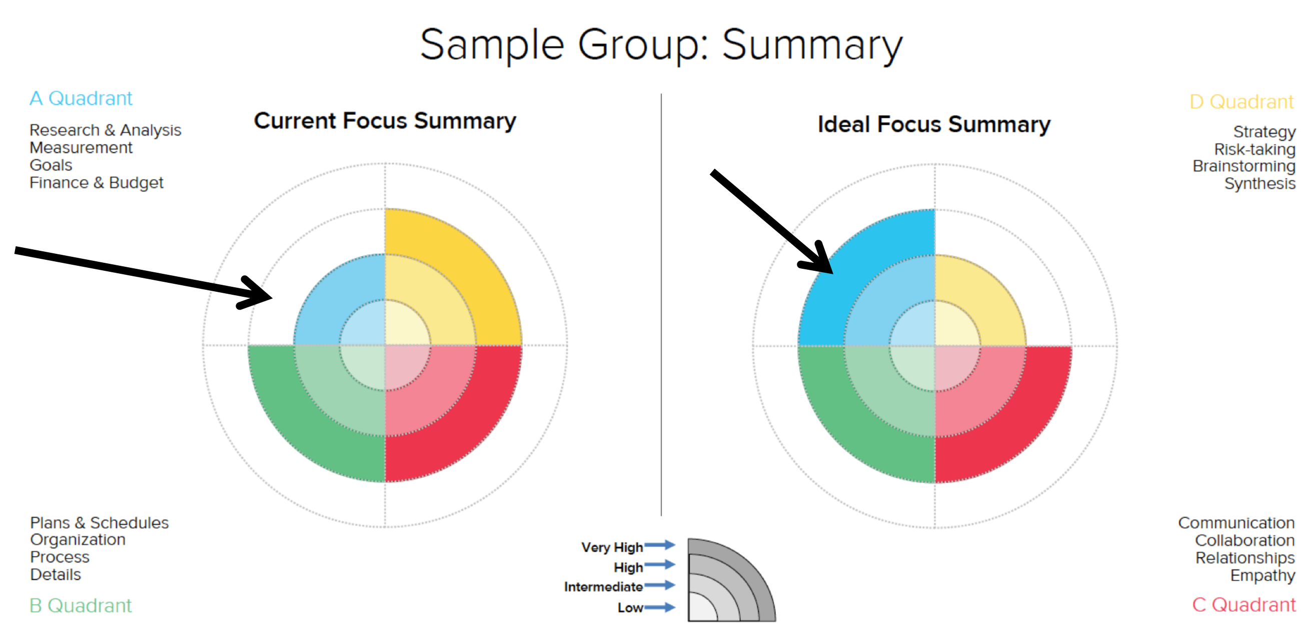
Page 1 contains a Summary comparison of:
1) The team's views on where the team is currently focused
2) Where they think it should be focused.

Each of the two graphs has the 4 quadrants of the Whole Brain® Model, and each quadrant has 4 potential "layers" representing the degree of focus. The more colored layers in a quadrant, the higher the degree of focus.

This split screen view shows the team's current focus on the left and their ideal focus on the right represented in the Whole Brain model.

In the sample below we see that the team views their current focus as being low in the A quadrant, while it should be medium. The team's current high focus on yellow would be more appropriate at the low level. So, as we look at where the team is compared to where they think they need to be, we can see an overemphasis or focus on the D quadrant activities and a lack of emphasis and focus on the B quadrant.

Review the team's HBDI® Team Profile if you have it. How does the team's average preference compare to these results? Do they correlate? How might the team preferences influence their focus on the job?



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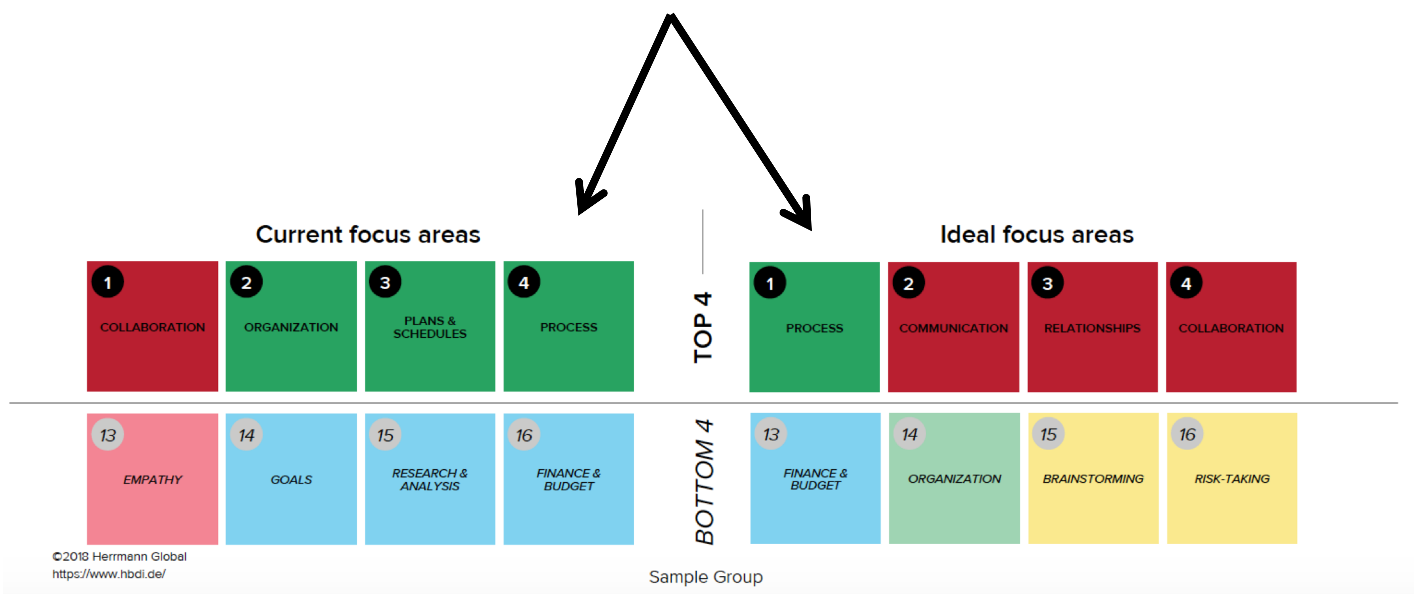
Interpreting the Results
Summary Page

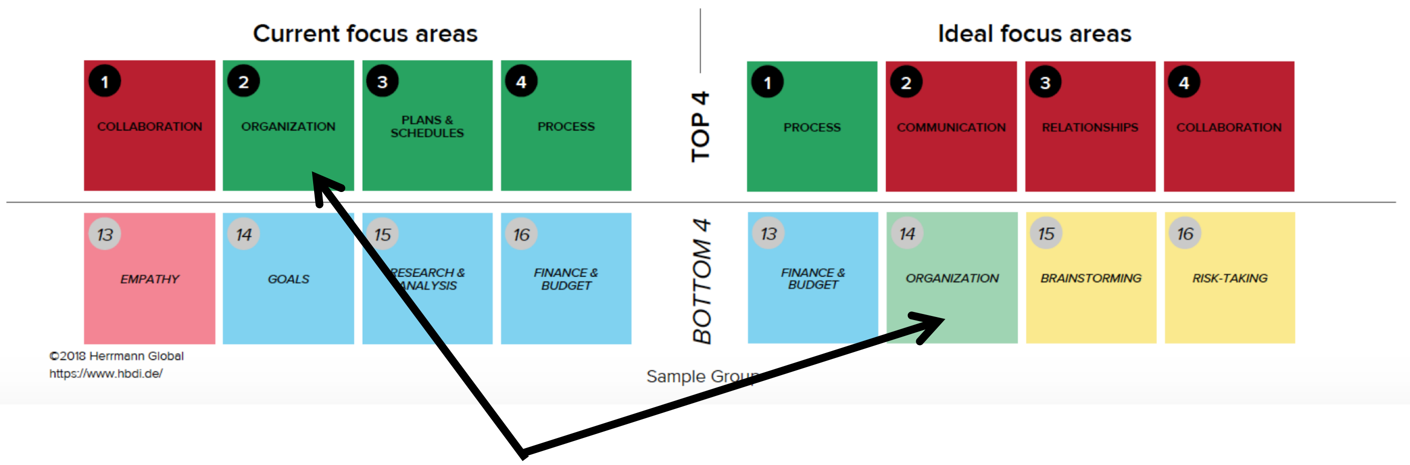
The first page also includes a ranking of the top 4 and bottom 4 areas for both current focus and ideal focus. This section of the report rank orders the team's perspective on focus from highest to lowest.

As you plan for the discussion with the team draw from your experience doing HBDI® debriefs. Look for areas of clear alignment. This represents areas of team strength. Also look for notable differences or large gaps between the team's current and ideal focus. These gaps can provide insight on team blockers and blind spots.

In the sample below the team feels Process is ranked number 4 (on the left chart), but should be number 1 (on the right chart). This is a excellent topic for discussion with this team. Why does process need more attention? How is lack of focus on process impacting the team?



Interpreting the Results Summary Page

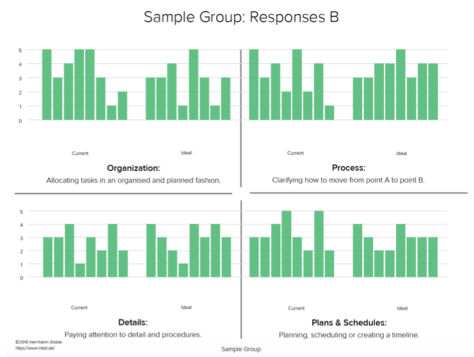


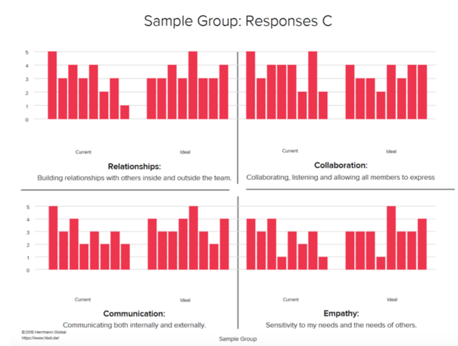
Look for other inconsistencies between current and ideal focus. In this sample we see that Organization is ranked 2 as a current focus, but ideally would rank 14! That's quite a difference and such a significant gap between current and ideal merits discussion with the team. What is driving the focus on Organization now? What would improve if Organization was de-emphasized?

Interpreting the Results Responses: A, B, C, D

Pages 2-5 of the report show a detailed overview of the team's individual responses for each of the 16 areas of Team Effectiveness (4 in each quadrant), for both current and ideal focus.

Note that although the individuals' responses are in the same order for each quadrant and can therefore be reviewed on an participant-by- participant basis, the answers are anonymous and should be treated as such.



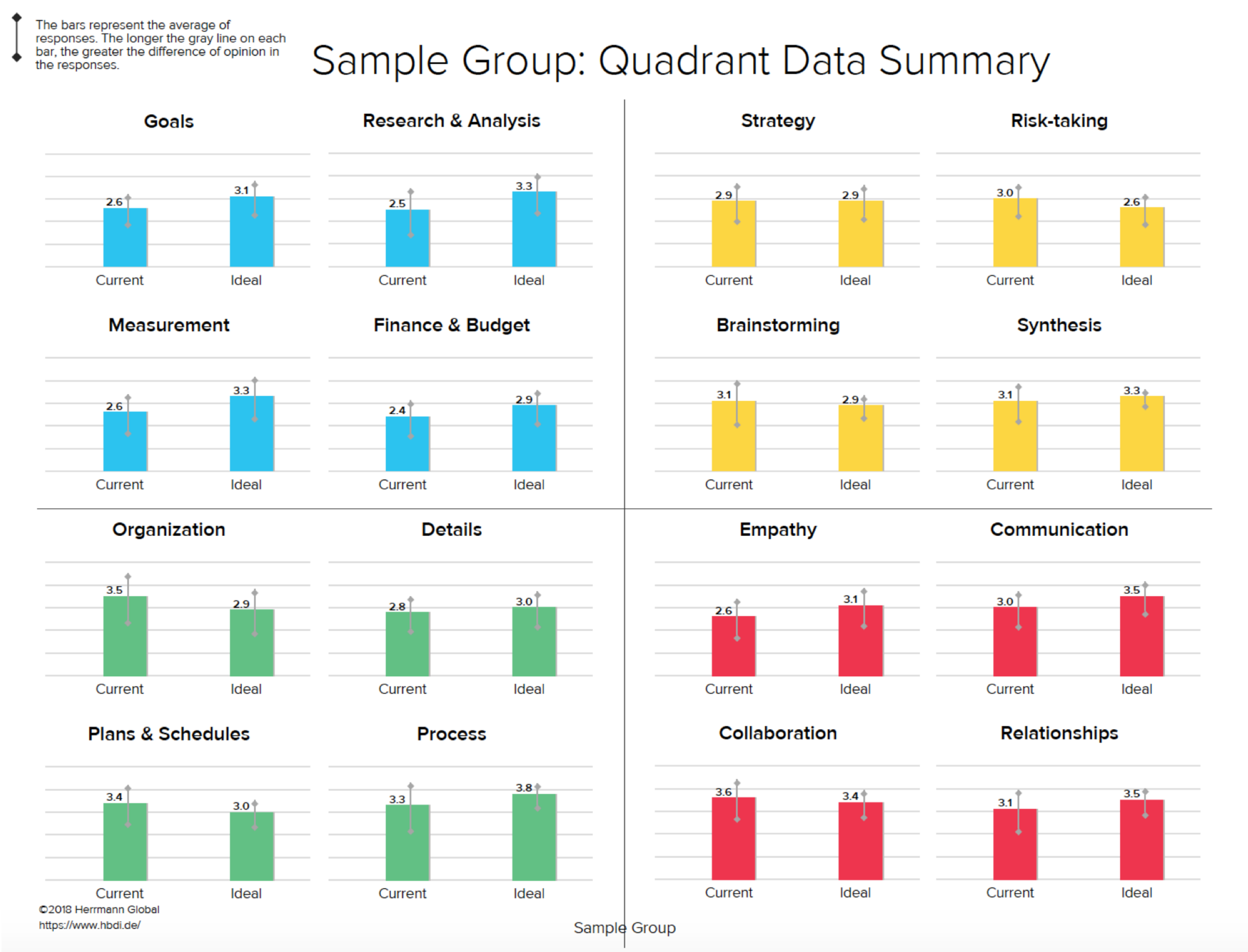


Interpreting the Results
Quadrant Data Summary

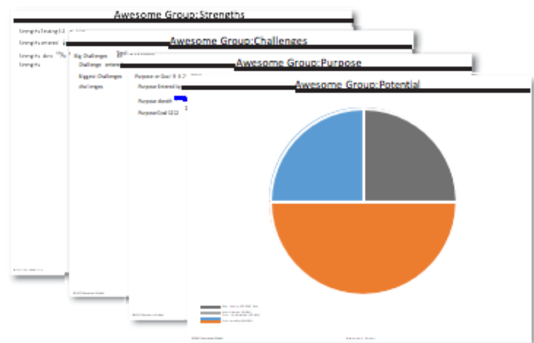
Page 6 shows a Quadrant Data Summary of the responses for each of the 16 Team Effectiveness areas, each of which shows the team's aggregate view of current and ideal focus.

The graphs show the team's views on a scale of 1 (lowest) to 5 (highest).

The average score for each aspect's current and ideal focus is shown on the bar graphs. Overlaid on the bar charts is a vertical line representing the degree of agreement, based on the standard deviation of the team's responses. A shorter line implies more agreement among team members, and a longer line implies more disagreement.



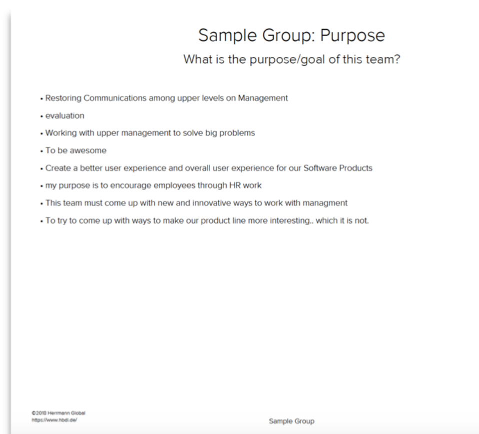
Interpreting the Results
Open-ended Responses



Pages 7-10 display the team's aggregated responses to the qualitative aspects of the survey, specifically the open-ended questions:

· What is the purpose / goal of this team?
· Is this team working to its maximum potential?
· What are the strengths of this team?
· What do you see as the biggest challenge facing this team?

The open-ended responses may extend to multiple pages and there may be sensitive comments. **Note: These should be reviewed and shared with care.** In some instances, you may not wish to share these pages directly with the team, but instead call out broad themes or areas of further exploration.



Sample Group: Purpose

What is the purpose/goal of this team?

- Restoring Communications among upper levels on Management
- evaluation
- Working with upper management to solve big problems
- To be awesome
- Create a better user experience and overall user experience for our Software Products
- my purpose is to encourage employees through HR work
- This team must come up with new and innovative ways to work with managment
- To try to come up with ways to make our product line more interesting.. which it is not.

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Sample Group

Read through the responses carefully. Look for common themes or repeated sentiment. This indicates areas of agreement in opinion which may be aligned in a positive or negative way. How might common themes be influencing group thinking and behavior?

Look for specific comments that may be actionable by the team. Avoid focusing on comments that are too vague or do not provide enough detail to generate lively team discussion and contribute to an Action Plan.

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Delivering the Results

Required Materials and Equipment

- Facilitator Guide
  - Delivery instructions
  - Investigation Questions Activity (for your use or use with the team)
  - A set of questions to prompt good evaluation of the team data
  - Team Effectiveness Worksheet
    - A guide for evaluating "what we do well" and "where we might want to improve"
  - Team Action Plan Activity
- Meeting space
  - Use a round or single table that allows team members to face each other. Avoid separate tables, row seating or other classroom environments that hamper discussion.
- Facilitator laptop and projector
- Name tents and badges (optional)
- Internet Access for facilitator, participants
- Flipchart, markers
- Handouts for each activity for each participant
- Hardcopy of report for each participant (optional)
- HBDI® Team Report (soft copy) – note that it is strongly recommended that the team complete and review the HBDI® Team Profile results for full understanding of team preferences prior to using the Herrmann® Team Effectiveness Dashboard.

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Investigation Questions

How to analyse the Herrmann® Team Effectiveness Dashboard

1. What are your key observations and insights?

2. Where do you notice more or less alignment? Why might there be more or less alignment?

3. Which Team Effectiveness areas are most relevant for this particular team?

4. Are there areas that do not relate to this team's function?

5. Look at the distribution of scores. Are they spread out or clustered together?

6. Which quadrants or descriptors are high focus areas (above the mid point of 3)?

7. Which quadrants or descriptors are low focus areas (below the mid point of 3)?

8. Which quadrants or descriptors are on the mid point (3)?

9. What are the implications of this data for the team?

10. What is the relationship between these insights on alignment (how the team members perceive team focus now and where it should be) and the HBDI® Team Profile (how the team members percieve themselves)?

HERRMANN® TEAM EFFECTIVENESS DASHBOARD

Worksheet

Team Effectiveness Worksheet

Based on questions from the previous page, write down your insights from the Herrmann® Team Effectiveness Dashboard, and identify potential actions to keep improving your team's effectiveness

Goals; measurement; data & research; finance & budget:	Risk; ideas; strategy; synthesizing:
Plans & schedules; organization; process; details:	Communication; empathy; relationships; collaboration:

HERRMANN® TEAM EFFECTIVENESS DASHBOARD

INSTRUCTIONS

Team Effectiveness Action Plan Activity Instructions

(Use the next page during facilitation)

After discussing the questions and completing the Walkaround to determine the thinking required for improvement, lead the team to decide and agree on best actions. Leaving the discussion with a clear plan of action is critical to measuring team progress over time.

- Hand out copies of the Action Plan on the next page or display on a projector so all team members can view it
- Ask a team member to volunteer to act as scribe, taking notes on the team commitment in each column.
- Keep this plan as a living document that is shared with the whole team and reviewed on a regular basis to track improvement.

HERRMANN® TEAM EFFECTIVENESS DASHBOARD

Worksheet

Team Effectiveness Action Plan

Plan for Success, One Milestone At a Time

What	Action	Thinking Required	Who	Due Date	Done

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After the Discussion

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After the Discussion: Evaluating Progress

WHAT?

Have team members take the Herrmann® Team Effectiveness Dashboard survey a second time after some time has passed since the first survey and discussion. Run the report again to consider the most current focus. Use this in conjunction with the initial proposal submitted to the team specifically around the goals and objectives articulated. Use the WalkAround to capture thoughts and evaluate the team's progress on the Action Plan that was created during the first discussion.

HOW?

(See next page)

WHY?

Because measurement and metrics are an important part of any intervention process, the Herrmann® Team Effectiveness Dashboard enables teams to measure the changes in the focus and, consequently, the operating style of the team over time.

Using the HBDI® Team Profile with the Herrmann® Team Effectiveness Dashboard as a way to gain insight and reflect on the performance and success of the team is important for current and future team projects. However, the HBDI® Team Profile itself is a preference report and cannot be used for measuring change. As a reminder, there are no right or wrong preferences, only consequences of your thinking— or in this case, consequences of the team's thinking.

WHO?

All team members and the HBDI® Certified Practitioner will evaluate the team's progress. Please note that the Team Effectiveness Dashboard is most effective when team members have already completed an HBDI® Profile and have been incorporated into the HBDI® Team Profile. You may want to have new team members complete their HBDI® and include them in the HBDI® Team Profile before you can have them participate in the Whole Brain® Team Effectiveness Dashboard survey and reevaluate progress.

Delivery Schedule Suggestion

Activity	Description	Show/Display/Use
1. Re-administer Team Dashboard	REFER to page 7 of this guide to review the process for completing the survey.	
2. Facilitator Preparation	COLLATE the information received from the new results. Compare the pre/post intervention reports. You may also want to review the HBDI® Team Profile data. CONSIDER: • Are there any differences? • What are they? • Are they relevant to the task? • Did the team operate outside its preferred thinking style? • How successful was the team at achieving its task? • What gaps are still apparent? • What strategies were effective?	
3. Run Session	REVIEW the Team Action Sheet to consider the actions the team has achieved. SHARE thoughts from your preparatory considerations above. ASK team members to reflect on these questions. Begin a conversation about what is being observed. USE the Worksheet and Team Action Plan again to summarize the results of this team. BEGIN in the yellow quadrant. ASK the team to redefine the big picture, vision or strategy to move forward. You may want to divide team members into groups and ask them to create an image of this. If images differ between the team groups, elicit responses to the different visions and why they are different.	

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Delivery Schedule Suggestion

Activity	Description	Show/Display/Use
3. Run Session	MOVE to the red quadrant and ask individuals to reflect on their personal experiences in this team. ASK team members to reflect on the following: • How they perceive the team climate • How they feel in the team • Have their opinions been considered and heard • Did they operate outside their preferences to achieve success MOVE to the blue quadrant and ask individuals to reflect on the data. SHOW participants the re-completed Team Effectiveness Dashboard. ASK participants to reflect on the following: • What does the data say? • What actions or metrics have been achieved? USE the Team Action activity to clarify what actions have been taken and achieved. MOVE to the green quadrant ASK participants to reflect on the following: • What next? • What has been learned? • What additional strategies are needed? • Are any more resources required? CAPTURE the thoughts of the team on a flip chart and compile and distribute a summary after the session. UPDATE the ACTION PLAN document and share with the team. SCHEDULE the next team survey and meeting.	

After the Session: Evaluating Progress

HOW?

Activity at a glance

Re-administer Team Dashboard

Refer to page 7 of this guide, summarizing how to access the Herrmann® Team Effectiveness Dashboard and run the team report again.

Facilitator Preparation

Collate and review information received from old and new Herrmann® Team Effectiveness Dashboard.

Conduct Session

Reflect on team actions achieved.
Summarize progress using the Team Effectiveness Action Plan.

Need support?

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