



A Whole Systems Approach to Self-Managed Teams

Self Managed Teams – The need for a wider perspective

Self-managed teams (SMTs) are introduced by organisations to improve the engagement and effectiveness of their staff, but if this is done without sufficient care and consideration the programme will be disappointing and fail over time.

The concept behind SMTs is that they are largely self-managing and learn how to best deliver their externally set purpose. This empowerment releases their creativity and energy. However off-the-shelf, standard approaches rarely work well for solving what are inevitably more, complex cultural and organisational system issues. Organisation designs should come out of the needs of the particular context and not from a pre-belief in a particular solution.

Tricordant have developed a whole systems approach to self-managed teams that encompasses and goes beyond standard SMT programmes. We have served a wide variety of organisations in many different sectors: from manufacturing sites to government departments; from hospital wards to small charitable bodies. Our approach involves the careful choice of the right organisation structure for a particular organisation, selecting systematically from a possible spectrum of solutions: from the classic hierarchical, functional department team to a fully empowered, devolved network of autonomous, self-directing teams. Solutions are almost always a mixed solution from somewhere along the continuum, and not from the extremes. The choice depends on the purpose of the organisational unit, the specific processes required to deliver that purpose and the degree of ‘separateness’ of that team’s processes from that of the teams around it and the wider organisation. To misquote John Doone “No team is an island”. Each team must be aligned to and integrated with its wider organisation, whatever the degree of empowerment and freedom is given.

This whole systems approach to self-managed teams includes the use of a set of design tools for making the right organisational choice in the right place. It combines an established approach to ‘whole systems’ organisation design with current best practice in systems theory, organisational design, leadership development and cultural change management. Clients are equipped to design and implement the right structure for them with the right degree of empowerment, self-management, matched with the right style of leadership, performance measures and administrative autonomy. It has to be appropriate both for the work of that team and the need for synergy with the wider organisation.

The Benefits of Self-managed Teams

Successfully changing to a team structure that is appropriately self-managing requires that each organisation creates its own solutions, but all solutions will have a common look and feel. Their uniqueness will stem from the particular mix of customer needs, organisational history, products, processes, resources, staff, technologies while the common feel will stem from the underlying principles. Their commonality will also stem from the common response of people to working within empowered and well- equipped teams to deliver a clear purpose. So what are some of the typical benefits from applying such a whole systems approach?

Customers have a better experience because they:

- Have the opportunity of building a relationship with those serving them;
- Interact rapidly with a person or team with the knowledge and scope to meet their needs;
- Find that if the first contact is defeated, his or her close colleagues can deal with the problem;
- Have a person who takes on the responsibility for seeing that their request is settled in full and only closes the case when the right outcome has been reached;
- Never find themselves ricocheting from pillar to post or phone queue to phone queue.



Staff know they are empowered through whole system SMTs because:

- As an individual and as a workgroup their work is meaningful;
- Responsibility and authority match;
- The technology used supports the team rather than condemning them to 'feeding the beast';
- Their performance measures correlate to a well-done job for the customer and company;
- The measures are challenging and stretching but achievable and within the team's sphere of control;
- Leadership is fair, supportive and enabling;
- They are in a team with a positive social dynamic and to which they can relate;
- The way in which work is organised encourages:
 - the workgroup to become a supportive team
 - workgroups to cooperate and encourage each other;
- Work is about learning and developing as a whole person;
- There is a good spirit in the place, so that work is fulfilling and rewarding.

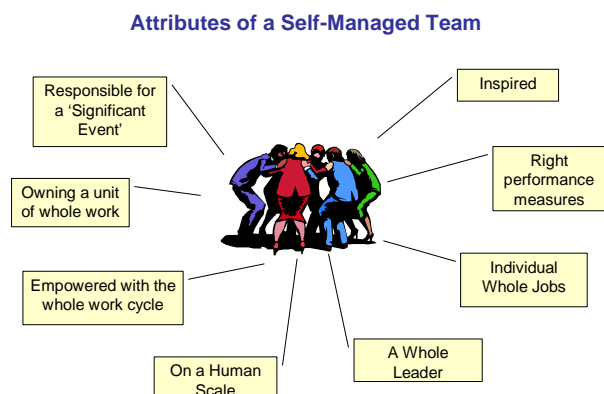
Managers know that the organisation is performing well because:

- The work is cost-effective and meets targets;
- Individuals and workgroups are self-motivated, naturally cost-effective and responsive to challenges and change;
- Good performance flows naturally out of the system rather than having to be driven out of it;
- There is commitment to the work as evidenced by reduced staff turnover;
- The organisation is a 'learning organisation'.

The Criteria for a Successful Self-managed Team

Tricordant's whole system approach to self-managed teams asserts that, for success and sustainability, each SMT should have:

- a) A clear identity and purpose around delivering a unique and significant value-add (a 'significant event') which does not overlap with that of other teams;
- b) A clear boundary and ownership of the process steps required to deliver its purpose and a full and appropriate set of core skills and deployable resources;
- c) The capacity to plan its tasks in line with corporate strategy, best practice and safety requirements, together with the remit to evaluate and learn from





their work;

- d) A team size on a human scale with regard to the complexity and stability of its work;
- e) Clear leadership aligning and co-ordinating the team with the wider organisation;
- f) Each team member able to contribute significant value towards the delivery of the team purpose;
- g) Performance measures that are based on efficiently delivering the purpose of the team;
- h) A motivating and inspiring culture.

Work to be carried out prior to the launch of SMTs

Tricordant can offer a set of 'whole system' design tools to help ensure the vital pre-launch stage is completed thoroughly and successfully. The right organisational design is crucial. The organisation must spend time confirming the viability and sustainability of SMT working and in making the right choice of pilot SMTs.

It is recommended that a nominated project manager and key company staff are joined by external Tricordant support to form an internal project team to do this work, later joining up with members of the proposed pilot SMTs and supporting functions (HR, Finance, IT). Several weeks need to be put aside upfront for this intensive work.

Tricordant offer the following unique design tools for this critical work:

- **Whole Work Mapping:** The remit and work processes of the teams need to be appropriate for SMT working. Each team needs a clear separate identity, major significant and separate value-adding purpose to deliver and a carefully and well defined boundary. 'Whole Work Mapping' is used to map and confirm this. If these conditions aren't true for a team then they just won't work well as a SMT.
- **Tricord Scoring:** The processes of the team need a minimum amount of 'systemic separateness' from the working of adjacent teams and the wider organisation. It needs to be able to independently plan, deliver and learn to improve its work (the 'learning cycle'). You can't be a SMT if you are only empowered with half a learning cycle and another team has the other half. Tricord Scoring measures whether the team is sufficiently separable for SMT working.
- **Human Scale:** The right team size is important for successful team bonding and many factors such as process complexity, geographical spread, number of deliverables, rate of change of requirements, leadership loading, etc. all will affect the SMTs' 'comfortable maximum size' and avoid team stress and burn-out. Our Human Scale model can confirm if the team is on a human scale to make it easy for it to work as an integrated, motivated SMT.
- **Whole Job Design:** Job flexibility is an important part of SMT working. Cross-training in team roles needs to be thought through. All team roles need to be meaningful and motivating. Sufficient team flexibility needs to be built-in to meet the peaks in customer demand that will inevitably arise.
- **Team Charter Definition:** The organisation needs to be very clear of all the responsibilities of the team. The team needs to generate an agreed list of all the things it will Plan, Deliver and Learn. Equally the team need a list of all the things it doesn't have the remit to do. Decisions over areas such as resource procurement, budgeting, new member recruitment, formal discipline, IT system choice, etc each needs to be made. The boundary with the wider organisation must be clear and agreed. Tricordant has a tool for systematically designing what is the appropriate degree of empowerment and independence and for defining the team boundary. This eventually becomes a 'team charter'.
- **Whole Leadership Training:** This helps new team leaders to take ownership of their 'whole work units' and to understand their role in the wider organisational system. The full range of leadership tasks and the adoption of appropriate attitudes and leadership styles required in a newly empowered structure and culture have to be consciously worked on to avoid reversion to old habits.
- **Tricord Team Readiness Health Check:** The Tricord whole system model is used as a framework to confirm that all aspects of the organisation SMT design proposal are in alignment and no gaps have been left. It is a final check list before launch.



Training and Support Programme for SMTs

Correctly designed and empowered, self-managed teams will not need a team-building event as such; they will build their own team on the job. Their work will be inherently motivational and engaging. Their launch event is thus more of a confirmation of the team's organisational design and a 'rite-of-passage' which marks the setting-off point for that journey of growing teamwork. A day's workshop is appropriate, attended by the members of the team being launched and key stakeholders and staff from support functions affected by the change. A celebratory meal at the end of the day might mark the occasion.

Only very practical and essential skills training will be necessary pre-launch. The change to becoming a whole work team is a journey. The SMT doesn't have to become fully empowered on day one. It's like growing up and becoming a fully independent adult, there is a launch day when the person 'leaves home', but the process of growing to full maturity will have been going on and will continue to go on over months and years.

A key part of being an SMT is to self-manage their learning and development. Insisting on an externally defined up-front full training course goes against the spirit of this. They will learn best when they realise the need for some external input and call it in. The company can offer or source a menu of hard and soft skills training, coaching and development support for the teams to call from.

Building in Trust

The whole point of a more self-managed team is that they are equipped and empowered to achieve their externally set purpose, and that they themselves should be free to learn how to best deliver this. They should then achieve these goals in a significantly more productive and effective way than conventional teams. The point is that they need to be trusted to find what works best and to do more of what works well.

Teams should be measured on the successful delivery of their purpose and these measures will often be team-specific. There will be a temptation to measure the success of the SMT project through measuring its team behaviours. However then the SMT will then deliver what they think people want and what they think good team-working should look like. Rather the wider organisation should focus on measuring the team on their deliverables and the efficient use of resources they are provided with.

Having said that, the wider organisation needs to know that the team is functioning in a healthy way and there is not an impending liability, risk to customer service, or of damage to the company's reputation. The team must be audited by the wider organisation and be held-accountable to present evidence of its success and development. This should be done in an open, honest and supportive way. A culture of "no blame for trying and failing; we learn from our mistakes" needs to be communicated and established up-front and then carefully maintained.

The Reward

The benefits of this whole systems approach and to successfully implementing sustainable Self Managed Teams are in the order of an initial 10% - 30% improvement in performance in the first year across arrange of key performance measures for each team, and setting them on a path to a more effective and efficient future. A step change transformation in their achievements and performance is to be expected over time.

To learn more about our approach to and experience of self-managed teams contact: Simon Thane, Director, Tricordant Ltd., Tel: 01558 823927, Mob: 07989 112062, E-mail: simon@tricordant.com .