SITUATIONAL TEAM LEADERSHIP

Facilitator Guide

Don Carew
Eunice Parisi-Carew
Lael Good
Ken Blanchard
Ken Blanchard first developed Situational Leadership® with Paul Hersey in the late 1960s. In 1985, Blanchard and the Founding Associates of The Ken Blanchard Companies®—Marjorie Blanchard, Don Carew, Eunice Parisi-Carew, Fred Finch, Laurence Hawkins, Drea Zigarmi, and Patricia Zigarmi—created a new generation of the theory called Situational Leadership® II. The leadership model used in this product is based on the Founding Associates' second generation thinking and research, and is used with their permission.

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  Team Performance—An Interactive Introduction  
  Team Performance Assessment
Welcome to Situational Team Leadership!

This real work program provides you with a practical approach drawn from research-based models that have stood the test of time. The workshop focuses on developing team leadership skills and simplifies the often complex nature of teams training.

You are here because you want to work with people in a team context. If you have been on a high performance team or have worked with teams over the years, you know that developing teams is both a science and an art. This facilitator guide will be an aid in the science part. You will bring the art.

The Team Performance Process, the backbone of Situational Team Leadership, provides a solid foundation to get you started on the journey to high performance teamwork. In addition, there are expanded stand-alone modules, assessments, and sustainability tools available in a build-to-suit format that will enable you to leverage the knowledge and skills you have gained from the Team Performance Process.

This workshop incorporates state-of-the-art experiential exercises based on adult learning theory with a best practices training design. Options are provided to accommodate individual facilitator style and needs. Each activity has been tried, tested, and used throughout the world in organizations representing almost every size and culture imaginable. This program, based on the Team Performance Process, represents the best of team processes to be found anywhere.

At the end of the training experience, team leaders will not only have acquired some incredible team development tools, they leave prepared to apply them with their own teams. This team program truly bridges the gap from learning to doing.

We have dedicated a great many years of our professional lives to researching and analyzing the nature of teams and the practices that make them great. This program represents the best of our thinking. We encourage you to embrace it, make it your own, and share it with others.

Don Carew
Eunice Parisi-Carew
Lael Good
Ken Blanchard
## ONE-DAY TRAINING DESIGN

### ONE-DAY WORKSHOP

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**TOTAL TRAINING TIME**  
7 HOURS 05 MINUTES
ACTIVITY 1
INTRODUCTION

1. Introduce Workshop
   - Display visual aid 2—Welcome.
     - Welcome participants to Situational Team Leadership.
     - Introduce yourself.

2. Present Workshop Purpose
   - Display visual aid 3—Workshop Purpose.
     - To acquire the knowledge and leadership skills for developing high performance teams.
Refer to workbook page 1—Situation Team Leadership.

Make this remark ...

This workshop will help you acquire the knowledge and leadership skills for developing high performance teams.

3. Present Outcomes

Display visual aid 4—Outcomes.

Make these remarks ...

By the end of this workshop, you will be able to apply the Team Performance Process to:

- Benchmark a team against high performance teams
- Create a team charter
- Diagnose team development stages
- Match leadership behaviors to a team’s development needs
- Use appropriate strategies for team development
4. **Review Road Map**

- Display visual aid 5—Road Map to Performance.

- Refer to workbook page 2—Road Map to Performance.

- Make these remarks...

  *This road map is an overview of your path to high performance teamwork. It begins with the Team Performance Assessment (or TPA), which you completed prior to the session. As you can see, the TPA weaves throughout the major constructs of today’s session and continues beyond this workshop.*

  *Provide relevant information regarding breaks, lunch, environment, or logistics.*
1. Set Up Team Challenges Activity

- Display visual aid 8—Team Challenges.
- Refer to workbook page 3—Team Challenges.
- Give these directions...

When you filled out the Think Teams! worksheet as part of your prework, you were asked to identify your toughest team challenges. I’d like you to share your challenges in your group and begin by giving your name and your department or organization. Then, determine the 4–5 most common challenges and record them on your flip chart.

Throughout today’s session, you will be working as a team with the people at your table. So, your final task is to choose a name for your work team. To give you some ideas for a name, take a look at the strengths your team members recorded on the flip chart when you first came in.
2. **Discuss Team Challenges**

   WORK TEAMS 9 MIN.

3. **Share Team Challenges**

   LARGE GROUP 8 MIN.

   - Ask each team to share their common challenges and their team name.
   - Capture team names to record on the Teamwork! Game scoring sheet.

4. **Link Challenges to Session Outcomes**

   LARGE GROUP 2 MIN.

   - Point out common challenges among work teams.
   - Link challenges to specific outcomes to be covered in the session, such as ...
     - Not enough time—Although this is not directly dealt with, the reason there’s not enough time is that people are not clear about why they are a team and what they are supposed to be doing. If you haven’t planned well in the beginning, it takes more time later on. The team charter, which we will be learning more about today, starts out by establishing the team’s purpose and reason for being.
     - No clear roles—The team charter deals with clarity of roles.
• No accountability—Accountability is often difficult because of the organizational structure; however, understanding what happens at different stages of development will enable you to help make the team more accountable for final outcomes.

• Lack of motivation of team members—An understanding of the stages teams go through will help you recognize when low motivation typically occurs and allows you to follow it up with leadership behaviors that address the problem.

• Conflict—Although we will not be learning a conflict management process today, an understanding of the Team Performance Process will enable you to defuse some conflicts before they begin.

• Personal agendas—Personal agendas often arise when people do not have a shared reason for working together. Gaining clarity around the team’s purpose is addressed by the team charter.

Link challenges not covered in the workshop with other resources, such as ...

• Difficult personalities—Although not specifically addressed today, understanding the stages of team development can help you determine other issues that may appear to be personality conflicts.
Sometimes what seems like a difficult personality is simply a person expressing his or her own perceptions. A better understanding of individual differences and how they can actually be a benefit to the team is a critical factor in becoming a high performance team. The DISC and Myers-Briggs Type Indicator® can give you valuable insights about differences among team members.

Make these remarks ...

Our intent today is not to cover every single issue, but rather to give you a solid framework that you can build on as you go forward. We’ll talk about some of the ways you can do this in the action planning activity.
1. Review Obstacles to Success

- Display visual aid 16—Obstacles to Success.

- Refer to workbook page 4—Obstacles to Success.

- Point to the Team Challenges flip charts and make these remarks ...

  In the same way that teams have clearly recognized requirements for success, research has likewise identified the obstacles to team success. The team challenges that you listed match the research.

- Review the obstacles and link to the challenges on the flip charts ...
  - Not taking time to clarify purpose and goals
  - Unsure of what requires team effort
  - Lack of mutual accountability
  - Lack of resources
  - Lack of effective and/or shared leadership
  - Lack of focus on creativity and excellence
  - Lack of planning
  - Lack of support for a team culture
  - Inability to deal with conflict
  - Lack of training
2. Identify Top Three Obstacles

- Give these directions...
  
  *Check off the top three obstacles that apply to your team.*

- Refer to the team challenges on the flip charts and make these remarks...

  *You can see from your own experience that there are many pitfalls that can keep a team from being successful. The good news is that this session will provide you with a framework that will help you directly address many of these obstacles.*
1. Introduce Team Performance Models

- Display visual aid 17—Team Performance Models.

- Refer to handbook pages 5–6—The Team Performance Models.

- Point to the Team Performance Process poster and make these remarks ...

The Team Performance Process was designed to bring together several models that grew out of the research on teams and integrate them into a systematic method for creating high performance teams.

Let’s talk about those models for just a few moments.
ACTIVITY 9
TEAM PERFORMANCE PROCESS—STEP 1

1. **Introduce Step 1 of Team Performance Process**

   - Refer to handbook page 9—PERFORM.
   - Point to PERFORM on the Team Performance Process poster and make these remarks ...

   *We’re going to start by looking at the characteristics of a team that is functioning at its highest level, because step 1 in the Team Performance Process is to identify gaps in the PERFORM characteristics for your team.*
ACTIVITY 10
MY BEST TEAM

1. Set Up Best Team Activity

- Display visual aid 29—My Best Team.

- Refer to workbook page 5—My Best Team.

- Give these directions ...

Please refer to your prework—Think Teams!—and in your work teams, share an example of your best team experience—past or current, at or away from the workplace. Indicate the type and size of the team and what made the team successful. Then, compile a list of 6–8 of the most common characteristics that emerged from your stories.

And finally, create a poster, using words or pictures that represent these common characteristics.
2. **Conduct Best Team Activity**  
*WORK TEAMS 15 MIN.*

3. **Set Up Gallery Walk**  
*LARGE GROUP 1 MIN.*

- Display visual aid 30–A High Performance Team.

- Give these directions ...

  We are now going to do a gallery walk and visit each of the posters you have created. A spokesperson for your work team will explain the characteristics and types and sizes of teams represented on your poster.

4. **Conduct Gallery Walk**  
*LARGE GROUP 12 MIN.*

- Elicit and point out trends, similarities, and differences.

- Make remarks and ask questions, such as ...
  - One characteristic that is on every team’s poster is ...
  - What did you learn?
  - What does this mean?

- Make these remarks ...  

  We’ve just conducted a field study that validates 25 years of research on high performance teams. In other words, the characteristics that you identified match the official findings.
ACTIVITY 11
PERFORM

1. Introduce PERFORM

- Make this remark ...

  The Ken Blanchard Companies® has created an acronym to help you remember the characteristics that define a high performance team.

- Display visual aid 31—PERFORM Characteristics.

Refer to handbook page 10—The PERFORM Model.

Make these remarks ...

It’s called PERFORM:

- The P stands for Purpose and Values.
- The E stands for Empowerment.
- The R stands for Relationships and Communication.
- The F stands for Flexibility.
- The O stands for Optimal Productivity.
- The R stands for Recognition and Appreciation.
- The M stands for Morale.

We’ll look at each of them in more detail.
2. **Review Purpose and Values**

**LARGE GROUP 1 MIN.**

- Display visual aid 32—Purpose and Values.

- Refer to handbook page 11—Purpose and Values.

- Make these remarks ...

  Purpose and values are the glue that holds the team together and form the foundation of a high performance team. Purpose and values mean:

  - Commitment to a common purpose
  - Shared values and norms
  - Clear goals
  - Clear strategies
  - Clear roles
3. **Review Empowerment**

   **LARGE GROUP 1 MIN.**

- Display visual aid 33—Empowerment.

- Refer to handbook page 12—Empowerment.

- Make these remarks ...

  *Empowerment is a complex dynamic that defines the organizational support that must be in place to enable team members to effectively do their work. Empowerment means:*

  - Support for initiative, involvement, and creativity
  - Access to information
  - Clear decision making, authority, and accountability practices
  - Individual and team development
  - Commitment to team member growth and development