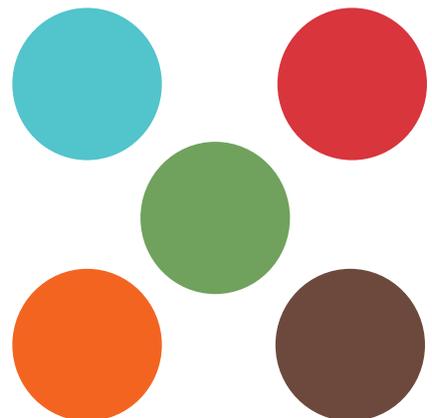




FACILITATOR GUIDE

Strategies to help teams achieve
full potential





OBJECTIVE OF THE PROGRAM

The Hogan Team Report training is an insight and interaction-based learning activity that is designed to increase an intact team’s evaluation of their strengths, motivational drivers, and development opportunities so as to maximize effectiveness as team members in pursuit of important business objectives. The use of Hogan data presented in the Hogan Team Report is used as a centerpiece for evaluation and analysis of the team’s attributes and performance capabilities.

The training also incorporates exercises and team discussions to give the team an opportunity to find significant strengths, challenges, and ways to reach an improved and productive teamwork strategy.

This guide provides a structure for how the Hogan Team Report workshop can be structured and facilitated in a half-day or full-day format. It must be emphasized that all teams have their unique needs and functionality, and thus, it is recommended that the facilitator adapt the process to fit the team, the business challenge, and the organizational context.

OVERVIEW OF THE PROGRAM CONTENT AND TIME ALLOCATIONS

Hogan Team Report Training [6-hour format]

Hogan Team Report Training [3.5-hour format]

Module 1: Introduction/Objectives	30 mins	Module 1: Introduction/Objectives	30 mins
Module 2: Team Roles	90 mins	Module 2: Team Roles	90 mins
Module 3: Team Derailers	45 mins	Module 3: Team Derailers	45 mins
Module 4: Team Culture	45 mins	Module 4: Team Culture	45 mins
Module 5: Team Development Planning	90 mins		
Module 6: Individual Development Planning	60 mins		

MATERIALS/RESOURCES NEEDED FOR THE PROGRAM

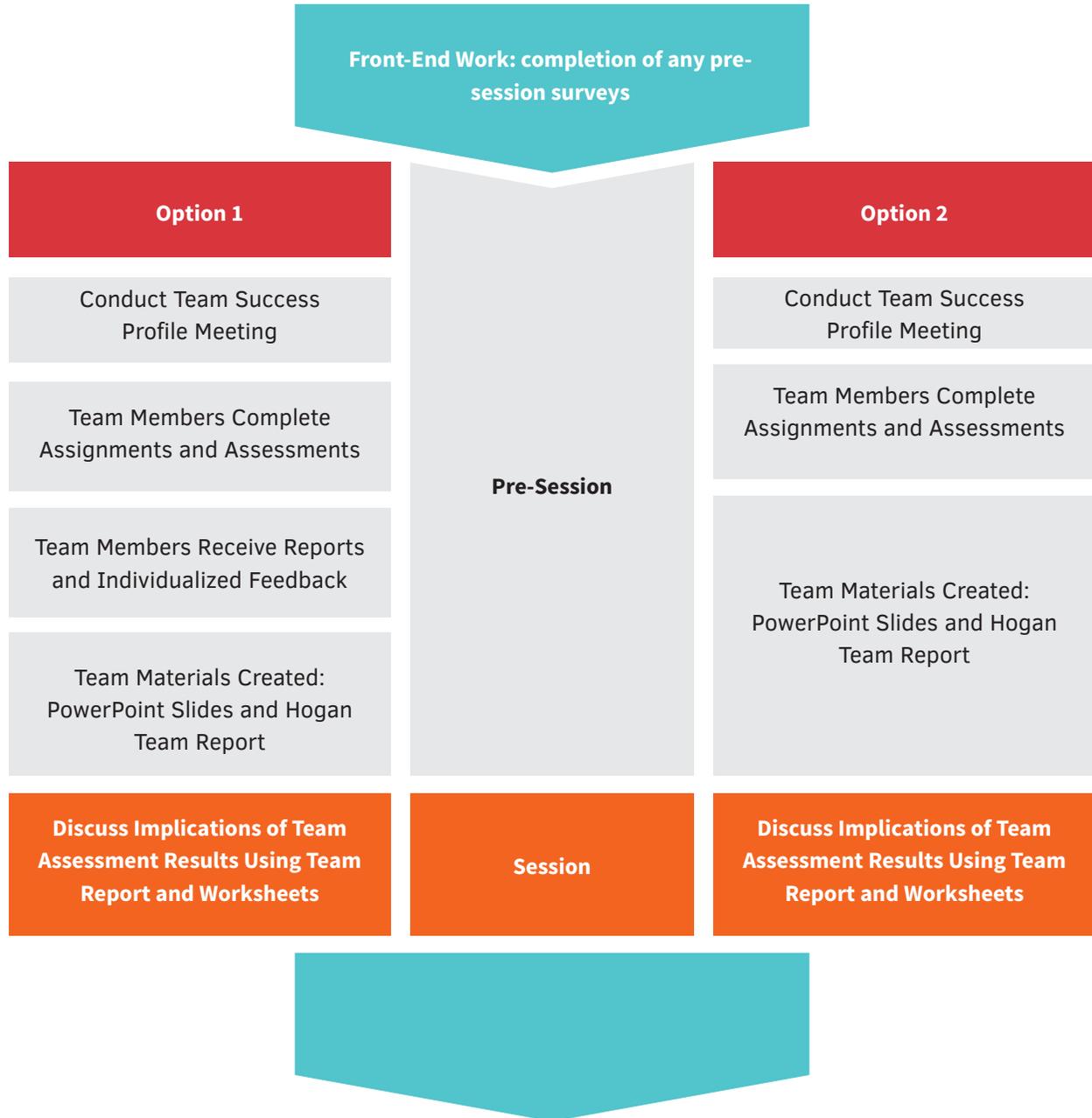
- Hogan Team Report(s)
- Worksheets/Hand outs: [Appendices]
- Media: Facilitator PowerPoint Deck
- Markers, pens, paper, and flip charts (optional)
- Hogan Team Report Manual (for facilitator)

MATERIALS CONSTRUCTION LIST (CREATED PRE-WORKSHOP)

1. Have participants complete a Brief Team Effectiveness Survey [Appendix C] (optional)
2. Customize slides 1, 12, 13 and 39



TEAM REPORT TRAINING: BIG PICTURE PROCESS FLOW





CONDUCT TEAM SUCCESS PROFILE MEETING

It is important to gain perspective from organizational stakeholders who are most vested in the team's success. Optimally, the facilitator would conduct a Team Success Profile Meeting with a strategic stakeholder (e.g., an executive/manager with a broad view of organizational goals and how the team goals relate), an HR stakeholder (to give perspective on team/collective development needs), and the team leader in attendance. At minimum, a meeting should be held with the team leader.

The following questions can support the facilitator in understanding the stakeholders' goals and context of the workshop:

1. Workshop Context/Objectives

- Is this for general development, goal planning, conflict management, or other specific issue/circumstance, etc. (e.g., newly assembled team, new team leader, M&A, etc.)?
- How have the assessments/workshop been communicated to the team?
- What do you hope to get out of this?
- Who will be seeing the Team Report?

2. Team Context/Goals

Please provide some background information on your team and the team culture (e.g., line of business/function/history, etc.):

- What are the team's primary goals?
- What would you say are the team's strengths?
- What are some areas you wish the team could improve on?
- What has been the key to team members' success? What leads to failure?
- Why are these the goals? How do they tie into the great organizational goals?
- How does the team handle change? Within-team conflict? Conflict with other teams?
- What are the best ways to implement change within the team?

3. Facilitator Reflection

- Regarding goal attainment: Is this an aggressive team? An organic (passive) team?
- Are the goals tangible, or more disorganized? (Are they expected to act like an interdependent, coordinated team? Or is it more like every person deals with the organizational/team ambiguity in their own way, at their own pace?)
- Are they more focused on improving results or relationships within the team?
- Are there internal or external barriers to success that need to be overcome?
- Is it more of a "getting along" or "getting ahead" mentality?
- What is the workplace environment, based on what you learned?
- Do the leaders' goals align with the individuals?



Reflection on these questions can create a framework for analyzing qualitative and quantitative data ascertained throughout the rest of the process.

During this meeting, the facilitator should also receive permission to present the team leader's assessment results during the workshop. There are several reasons we recommend the team leader permit this:

1. In the final part of the workshop, team members may be asked to talk about individual takeaways, and how they will each contribute to overall team improvement. Showing the team leader's profile beforehand helps to build trust, and creates a safe environment for team members to share openly during this phase, and throughout the workshop.
2. Each team member can assess how she/he relates to the boss in terms of work style, as well as understand how she/he fits into the team culture, or where potential friction points with the leader may manifest.
3. Helps hone team skills for influencing/communicating upwards.

TEAM MEMBERS COMPLETE ASSIGNMENTS AND ASSESSMENTS

Hogan assessments can be administered in several different ways, and it is best to talk to your local Hogan provider for more information.

Choosing Individual Reports to Be Generated

During the business development phase of the project, it is also important to determine which individual reports will be issued for pre-workshop one-on-one feedback. Please note that in order to generate the Hogan Team Report, all three Hogan core assessments (HPI, HDS and MVPI) must be completed by participants.

We highly recommend the [Leadership Forecast Report](#) (LFR) Series be issued for individual team members, for the purposes: of one-on-one feedback. We recommend this set of reports for the following reasons:

1. The LFR Series can come with a complimentary Coaching Report, which individuals can utilize after the workshop to work on individual development goals that support the agreed upon team development actions.
2. The LFR Series provides behavioral as well as leadership implications. Teams with members in mid-level management and executive positions will benefit from these interpretations.
3. The LFR Series also provides basic competency analysis to help those more familiar with a competency vernacular to interpret individual results.

Alternatively, in some cases, the Insight Series (<http://www.hoganassessments.com/content/insight-series>) can be used. Please talk to your Hogan Consultant or facilitator for more information.



TEAM MEMBERS RECEIVE REPORTS AND INDIVIDUALIZED FEEDBACK

Before a Hogan Team Report Workshop, it is critical that one-on-one feedback is delivered to individual team members around each participant's Hogan report. This part of the process acquaints each team member with her/his assessment results. Accordingly, each team member is given the space to:

- Become familiar with Hogan terminology and the benefits, as well as drawbacks, associated with her/his profile, which is composed of the same scales and constructs that will be reviewed in the upcoming workshop.
- Ask questions and become comfortable with individual development needs before understanding the collective results at the team level.
- Prepare for a broader discussion during the workshop (rather than being focused on her/his own assessment results).

Individual feedback sessions also give the facilitator (and those supporting the facilitator):

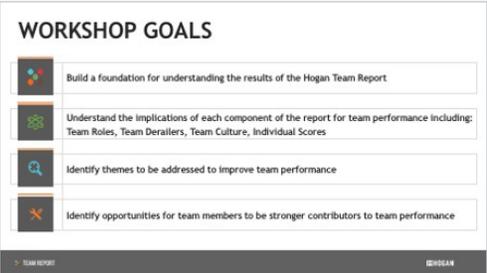
- Key themes (e.g., common challenges, goals, and perspective) to support and lend nuance to the upcoming quantitative analyses (i.e., data from the Hogan Team Report as well as other optional collective data). The facilitator should listen for information that aligns with, as well as contradicts, the Team Success Profile.
- Organizational vernacular that will help populate the workshop slides. Using common team vocabulary will ensure results, conclusions, and development suggestions are explained in a way that makes sense to team members, so they can easily begin capitalizing on strengths and striving toward goals.
- An idea of how well private individual goals are fall in line with team goals, and thus organizational goals.

There are helpful tips for giving individual feedback around Hogan assessments, which were first taught during the Hogan Assessments Certification Workshop (such as ensuring participants talk most of the time, results are delivered in a safe, nonjudgmental environment, etc.).

If more than one person is providing individual feedback, ensure an integration meeting is scheduled well before the workshop. The facilitator should take notes during this meeting. Any nuance, within-team divergence or discrepancies should be taken note of and explored during this time. It can be helpful to meet with the feedback providers prior to delivering feedback to align around preferred confidentiality, feedback, and note-taking protocols.



FACILITATOR NOTES, PRESENTER NOTES, AND MEDIA ANNOTATIONS

TOPIC/CONTENT	PRESENTATION METHOD	TIME	RESOURCES
<p>Module 1: Overview</p>	<p>Instructor Presentation Group Participation</p>	<p>30 min</p>	<p>Slides</p>
<p>Facilitator note</p> <p>This is the title slide. You will need to customize by inserting the group's name or organization name.</p>			<p>Slide 1</p>  <p>No animations</p>
<p>Facilitator note</p> <p>Typical elements could be to become a more integrated team, increase team performance and business results, and avoid potential team derailment.</p>	<p>Presentation note</p> <p>Say, "The objective of Hogan Team Report Training is to maximize your team's effectiveness in the pursuit of important business objectives. We will do this by evaluating your team's strengths, motivational drivers, and development opportunities."</p> <p>Read the training objectives.</p>		<p>Slide 2</p>  <p>No animations</p>



TOPIC/CONTENT	PRESENTATION METHOD	TIME	RESOURCES
<p>Module 1: Overview</p>	<p>Instructor Presentation</p>	<p>30 min</p>	<p>Slides Team Reports</p>
<p>Facilitator note This is the content outline of the training session.</p>	<p>Presentation note <i>Read or paraphrase</i> the six modules that will be covered in the training session.</p>		<p>Slide 3</p>  <p>No animations</p>
	<p>Presentation note Say, “Let’s look at some team concepts and ideas.”</p>		<p>Slide 4</p>  <p>No animations</p>



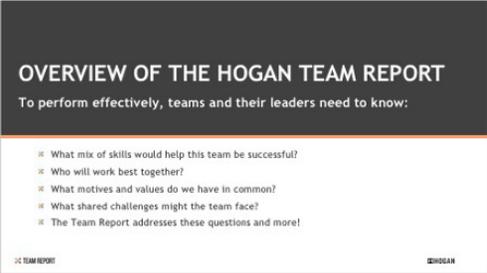
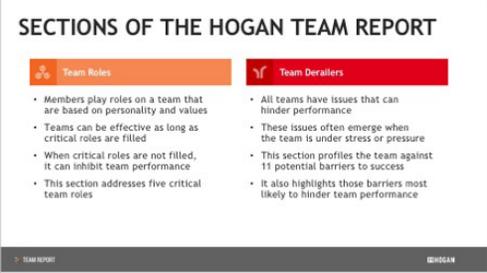
TOPIC/CONTENT	PRESENTATION METHOD	TIME	RESOURCES
<p>Module 1: Overview</p>	<p>Instructor Presentation</p>	<p>30 min</p>	<p>Slides Team Reports</p>
<p>Facilitator note</p> <p>Tip: a real team is more than the sum of its parts. Synergy is achieved when the team outperforms its best member.</p>	<p>Presentation note</p> <p><i>Read or paraphrase</i> “What is a team? A team consists of three or more people who are dependent on one another, and who share a common goal, leadership, success, and failure.”</p>		<p>Slide 5</p> <div data-bbox="927 491 1414 766" style="border: 1px solid gray; padding: 10px;"> <p>WHAT IS A TEAM?</p> <ol style="list-style-type: none"> 1. A team has <i>three or more people</i> 2. Members are <i>dependent on each other*</i> 3. They share a <i>common goal</i> 4. They share <i>common leadership</i> 5. They share <i>success and failure</i> with one another <p><small>* Too often, work groups are mistaken for teams. For a group to truly represent a team, there must be a degree of dependence upon one another to achieve success.</small></p> </div> <p>No animations</p>
<p>Facilitator note</p> <p>Tip: teaming is episodic—we don’t want to team all the time. It depends on the task – some tasks don’t require cooperation.</p>	<p>Presentation note</p> <p><i>Read or paraphrase</i> the five points on the importance of teams and collaboration, nothing the mediocre level at which teams “work” (50% of the time).</p> <p>Ask “What gets in the way of teams working efficiently only about half the time?” List and post the audience’s responses.</p>		<p>Slide 6</p> <div data-bbox="927 984 1414 1260" style="border: 1px solid gray; padding: 10px;"> <p>WHY FOCUS ON TEAMS?</p> <ul style="list-style-type: none"> ✦ Over the last decade, organizational use of teams has increased dramatically—at least 48% of organizations use teams to accomplish objectives. ✦ Few objectives are accomplished based solely on individual work. ✦ Individuals devote at least a proportion of their efforts to tasks requiring collaborative work—54% of individuals spend at least 30% of their day in a team setting. ✦ Evidence suggests that teams “work” well approximately 50% of the time. ✦ Personality is significantly related to team performance and viability.  </div> <p>No animations</p>



TOPIC/CONTENT	PRESENTATION METHOD	TIME	RESOURCES
Module 1: Overview	Instructor Presentation	30 min	Slides Team Reports
<p>Facilitator note</p> <p>Tip: from evolution, it was the effectiveness of the group – not any one individual – that was key to the survival of our species. Groups that perfected cooperation and harnessed the skills and energy of their members outperformed and out-competed those who failed to work together. What we now call teamwork became a competitive advantage for Homo sapiens.</p>	<p>Presentation note</p> <p>Say “We know that personality affects team performance—our research focuses on three dimensions measured in the Hogan Team Report:</p> <p>How an individual will approach their role within the team, which we can glean from individuals’ HPI scores.</p> <p>How an individual interacts with the rest of their team, which we can predict from individuals’ HDS scores.</p> <p>How an individual’s values align with the rest of the team, which we can identify from individuals’ MVPI scores.”</p>		<p>Slide 7</p> <p>No animations</p>
<p>Facilitator note</p> <p>Tip: a good team won’t always matter, and good teams are more important in some situations than others (e.g., senior teams). While a good team can have a positive impact, bad teams definitely undermine performance.</p>	<p>Presentation note</p> <p>Ask the three questions bulleted on slide 8. List and expound upon the audience’s responses.</p>		<p>Slide 8</p> <p>No animations</p>

Case Study Example: On an engineering team at a high technology firm whose innovations were quickly evolving, the Relationships role was occupied by the fewest number of team members. In addition, few members occupied the Results role. On this team, it was imperative that members contribute to discussions with straightforwardness and conviction, so as not to miss a fast-moving opportunity or fail to convince the team of a winning idea. Thus, the Results role became the team’s developmental priority (in accordance with the Team Success Profile), even though the Results role was not the smallest percentage of the team’s makeup.



TOPIC/CONTENT	PRESENTATION METHOD	TIME	RESOURCES
<p>Module 1: Overview</p>	<p>Instructor Presentation</p>	<p>30 min</p>	<p>Slides Team Reports</p>
<p>Facilitator note</p> <p>Although most of the models devoted to creating high-performing teams focus on achieving the proper mix of skills and experience, they ignore the influence of personality.</p>	<p>Presentation note</p> <p><i>Ask rhetorically</i> the questions on slide 8, then say “Based on the assessment of individual personalities and values, this report provides insights and recommendations to answer these questions and facilitate team performance.”</p>		<p>Slide 9</p>  <p>No animations</p>
<p>Facilitator note</p> <p>The Hogan Team Report draws on personality assessments to help teams understand their internal dynamics. It provides the necessary information to balance psychological roles, identify gaps and potential fracture lines, and understand team culture.</p>	<p>Presentation note</p> <p>Say Before the Hogan Team Report analyzes team members’ scores on the Hogan Personality Inventory to identify which psychological role each team member naturally gravitates toward. Using the Hogan Development Survey, the Hogan Team Report identifies shared performance risks, or derailers, that can become problematic when team members are excited, tired, overburdened, or otherwise distracted.”</p>		<p>Slide 10</p>  <p>No animations</p>

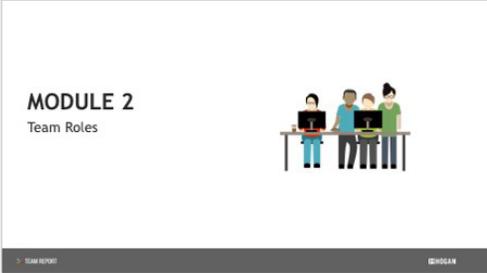
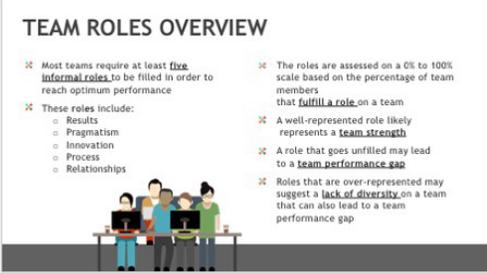


TOPIC/CONTENT	PRESENTATION METHOD	TIME	RESOURCES
<p>Module 1: Overview</p>	<p>Instructor Presentation</p>	<p>30 min</p>	<p>Slides Team Reports</p>
<p>Facilitator note</p> <p>The Hogan Team Report draws on personality assessments to help teams understand their internal dynamics. It provides the necessary information to balance psychological roles, identify gaps and potential fracture lines, and understand team culture.</p>	<p>Presentation note</p> <p>Say “Team culture is the sum of its members’ values – the powerful motives and preferences that determine what we desire and are willing to work for. When a team’s core values are divergent, team members don’t gel, conflicts can become personal, and turnover is more frequent.”</p>		<p>Slide 11</p> <div data-bbox="927 506 1414 779"> </div> <p>No animations</p>
<p>Facilitator note</p> <p>Customize this side: insert the team name, description, and team member names.</p>	<p>Presentation note</p> <p>Say “Here are our team members . . . the Team Report is based upon data from each of you.”</p>		<p>Slide 12</p> <div data-bbox="927 1014 1414 1287"> </div> <p>No animations</p>



TOPIC/CONTENT	PRESENTATION METHOD	TIME	RESOURCES						
Module 1: Overview	Instructor Presentation	30 min	Slides Team Reports						
<p>Facilitator note</p> <p>Customize the slide to reflect the team's roles, derailers, and key drivers/culture.</p>	<p>Presentation note</p> <p>Say "Here's a preview of our team's dominant team roles, team derailers, and key drivers for our team culture. We will look at each of these."</p>		<p>Slide 13</p> <div data-bbox="922 487 1414 762" style="border: 1px solid gray; padding: 10px;"> <p>FORESHADOWING THE TEAM THEMES</p> <table border="0"> <tr> <td style="vertical-align: top;"> <p>Team Roles The team has a high percentage of members who fulfill the PRAGMATISM role. The team approaches work with a practical, real world orientation. The team has a low percentage of members fulfilling all other roles which may suggest a degree of imbalance.</p> </td> <td style="background-color: #444; color: white; text-align: center; vertical-align: middle; width: 40px;">Theme 1</td> </tr> <tr> <td style="vertical-align: top;"> <p>Team Derailers The team has three potential key derailers including LEISURELY, EXCITABLE, and RESERVED. These derailers suggest that the team may isolate itself at times and others (outside the team) may find the team to be somewhat insular and difficult to approach.</p> </td> <td style="background-color: #444; color: white; text-align: center; vertical-align: middle;">Theme 2</td> </tr> <tr> <td style="vertical-align: top;"> <p>Team Culture The team has three key value drivers including HEDONISM, POWER, and COMMERCE. These values suggest a team that likes to be in control of its destiny, uses commercial performance as yardstick of success and promotes a work hard - play hard atmosphere.</p> </td> <td style="background-color: #444; color: white; text-align: center; vertical-align: middle;">Theme 3</td> </tr> </table> <p style="font-size: 8px; margin-top: 5px;">TEAM REPORT BIRDEAN</p> </div> <p>No animations</p>	<p>Team Roles The team has a high percentage of members who fulfill the PRAGMATISM role. The team approaches work with a practical, real world orientation. The team has a low percentage of members fulfilling all other roles which may suggest a degree of imbalance.</p>	Theme 1	<p>Team Derailers The team has three potential key derailers including LEISURELY, EXCITABLE, and RESERVED. These derailers suggest that the team may isolate itself at times and others (outside the team) may find the team to be somewhat insular and difficult to approach.</p>	Theme 2	<p>Team Culture The team has three key value drivers including HEDONISM, POWER, and COMMERCE. These values suggest a team that likes to be in control of its destiny, uses commercial performance as yardstick of success and promotes a work hard - play hard atmosphere.</p>	Theme 3
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TOPIC/CONTENT	PRESENTATION METHOD	TIME	RESOURCES
<p>Module 2: Team Roles</p>	<p>Instructor Presentation</p>	<p>90 min</p>	<p>Slides Team Reports</p>
	<p>Presentation note</p> <p>Say “Let’s begin by looking at the psychological roles that compose the group.”</p>		<p>Slide 14</p>  <p>No animations</p>
<p>Facilitator note</p> <p>Team members will be creating specific, tangible performance objectives and goals against which the day’s assessment data will be evaluated in terms of alignment (things to hold onto, things to work on).</p>	<p>Presentation note</p> <p>Say “Most teams require at least five informal roles to be filled in order to reach optimum performance. These roles include: Results, Pragmatism, Innovation, Process, and Relationships.</p> <p>The roles are assessed on a 0% to 100% scale.</p> <p>A role well-represented on a team represents a team strength.</p> <p>A role that goes unfilled may lead to a team performance gap.</p> <p>Roles that are over-represented may suggest a lack of diversity on a team that can also lead to a team performance gap.</p>		<p>Slide 15</p>  <p>No animations</p>



TOPIC/CONTENT	PRESENTATION METHOD	TIME	RESOURCES
<p>Module 2: Team Roles</p>	<p>Instructor Presentation</p>	<p>90 min</p>	<p>Slides Team Reports</p>
<p>Facilitator note <i>Psychological roles are the informal roles that a person gravitates to, based upon their personality.</i></p>	<p>Presentation note Say “We found that there are five psychological roles to which people naturally gravitate: Results, Relationships, Process, Innovation, and Pragmatism.” <i>Briefly define each role.</i></p>		<p>Slide 16</p> <div data-bbox="927 558 1414 831" style="border: 1px solid black; padding: 5px;"> <p>TEAM ROLES</p> <ol style="list-style-type: none"> 1 Results - People who organize work, clarify roles, coordinate, and provide direction for others. They enjoy taking charge and pushing for results. 2 Pragmatism - People who provide practical, hard-headed evaluations of ideas and proposals. They advocate pragmatic solutions, and their views are not influenced by the need to maintain harmony. They are direct and grounded in reality. 3 Innovation - People who recognize when conditions have changed and when the team needs to adapt. They spot emerging trends and patterns quickly, enjoy solving problems, and generate creative solutions. 4 Process - People who are concerned with implementation, the details of execution, and the use of processes and systems to complete tasks. They are reliable, organized, and conscientious about following procedures. 5 Relationships - People who are concerned about morale and how team members are getting along. They are positive and optimistic, attuned to people’s feelings, and good at building cohesive relationships. </div> <p>No animations</p>
<p>Facilitator note Assign Team Roles to dyads or triads—provide markers and flip chart paper for each group.</p>	<p>Presentation note Say “In this exercise, you are going to discuss the assessment results associated with the five Team Roles and the implication those results have for your team.” <i>Follow enumerated directions, 1 through 4.</i> <i>Advance to next slide (#18).</i></p>		<p>Slide 17</p> <div data-bbox="927 1152 1414 1425" style="border: 1px solid black; padding: 5px;"> <p>TEAM ROLE EXERCISE</p> <p>In this exercise, you will discuss the assessment results associated with the five Team Roles and implications for your team.</p> <ol style="list-style-type: none"> 1. Facilitator will break team members into dyads or triads depending on the size of the team. 2. Each dyad or triad will be assigned a Team Role. 3. Each Dyad or Triad should spend (X) minutes discussing their assigned Team Role, responding to questions on the following slide. 4. Responses should be recorded on a flip chart for the team discussion. 5. The facilitator will call the group back together and facilitate a team discussion of the flipchart responses. </div> <p>No animations</p>

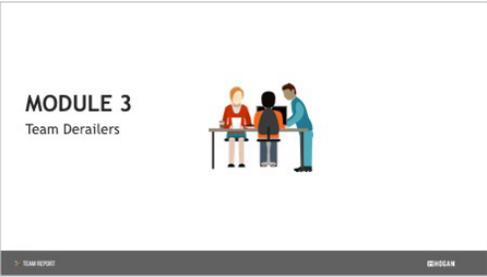
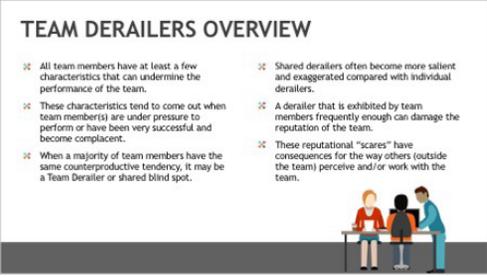


TOPIC/CONTENT	PRESENTATION METHOD	TIME	RESOURCES
<p>Module 2: Team Roles</p>	<p>Instructor Presentation</p>	<p>90 min</p>	<p>Slides Team Reports</p>
<p>Facilitator note Have dyads/triads discuss their answers to the assigned questions.</p>	<p>Presentation note <i>Facilitate a discussion of Team Roles, impact on the team, and possible development opportunities.</i></p>		<p>Slide 18</p> <div data-bbox="927 541 1414 816" style="border: 1px solid gray; padding: 10px;"> <p>TEAM ROLE EXERCISE Discussion Questions</p> <p>Based on the Team Role score:</p> <ol style="list-style-type: none"> 1 How would you describe the team's behavior with respect to this role? 2 What impact might this behavior have on the success of the team and why? 3 Given the behavior and its impact on the team, what actions might the team consider in response to the assessment result? <p><small>© TEAM REPORT</small> <small>© HOGAN</small></p> </div> <p>No animations</p>
<p>Facilitator note Set-up note: Make sure participants have a copy of their Reflection Worksheets.</p>	<p>Presentation note <i>Read the directions for Self-Reflection Time, ask for questions, then time the activity.</i> <i>Advance to slide 20.</i></p>		<p>Slide 19</p> <div data-bbox="927 1144 1414 1419" style="border: 1px solid gray; padding: 10px;"> <p>SELF REFLECTION TIME Team Rules</p> <p>Based on your individual scores on Team Roles</p> <ol style="list-style-type: none"> 1 Using the Reflection Worksheet provided by the facilitator, list the top 1-3 roles for which you contribute the most to the team based on the assessment results (Key contribution is indicated by a bold color). 2 Below each role you list, describe what you believe to be your biggest contribution to the team with respect to the role. 3 If you think there is an additional role to which you contribute that enhances team performance, list it and provide a brief description. <p>Questions?</p> </div> <p>No animations</p>



TOPIC/CONTENT	PRESENTATION METHOD	TIME	RESOURCES
<p>Module 2: Team Roles</p>	<p>Instructor Presentation</p>	<p>90 min</p>	<p>Slides Team Reports</p>
<p>Facilitator note Make sure participants have a copy of their Reflection Worksheets. Appendix A</p>	<p>Presentation note <i>Time the activity.</i></p>		<p>Slide 20</p> <div data-bbox="922 552 1414 827" style="border: 1px solid black; padding: 10px;"> </div> <p>No animations</p>



TOPIC/CONTENT	PRESENTATION METHOD	TIME	RESOURCES
Module 3: Team Derailers	Instructor Presentation Group Discussion	45 min	Slides Reflection Worksheets Team Reports
Facilitator note The Team Derailer section of the report is derived from the HDS, which identifies characteristics that can derail individual performance.	Presentation note <i>Say</i> “All teams have weaknesses that inhibit their ability to be effective. These derailers are assessed by the Hogan Development Survey.”		Slide 21  No animations
Facilitator note All teams deal with the idiosyncrasies of their members. However, these potential derailers may become blind spots when shared by members of a team. These tendencies may trigger a spiral of disruptive behavior when the going gets tough or may emerge when colleagues become more comfortable and informal with each other.	Presentation note <i>Say</i> “Derailers risk undermining the team’s ability to move into high-performance mode. These dispositions emerge when individuals are not actively managing their public image, for example, when they are excited, over-burdened, tired, or when they let down their guard.” <i>Read and paraphrase bullet points.</i>		Slide 22  No animations

Case Study Example: Members of a finance team for an established multinational manufacturing company all had high scores on derailers Diligent and/or Dutiful. Although a black-and-white/deferential view of business and process was helpful for team members’ task execution and upholding compliance, these characteristics became overused strengths when serving internal customers. Team members were overlooking internal customers’ needs for flexibility and creative thought when there was no clear-cut process or precedent for addressing a unique request. Many times the team would collectively decide not to do a unique request, and it was rare that a team member piped up to suggest an alternative perspective. Team members were caught by surprise when other teams gave them unfavorable reviews on how they executed their collective role within the organization. The new norm created within the team by members having elevated scores on the same or thematically similar scales led to a collective blind spot.



TOPIC/CONTENT	PRESENTATION METHOD	TIME	RESOURCES
<p>Module 3: Team Derailers</p>	<p>Instructor Presentation Group Discussion</p>	<p>45 min</p>	<p>Slides Reflection Worksheets Team Reports</p>
<p>Facilitator note</p> <p>Have participants look at p. 5 of their reports.</p> <p>A key derailler is applied when 50% or more of the members in a team score in the top two quartiles on a particular scale.</p>	<p>Presentation note</p> <p>Say “Let’s look at how to interpret the team derailler scores. Look at page 5 of your report.”</p> <p><i>Read and paraphrase bullet points.</i></p>		<p>Slide 23</p> <div data-bbox="922 596 1409 869"> <p>INTERPRETING TEAM DERAILER SCORES</p> <p>☞ The scales are arranged according to three clusters:</p> <ul style="list-style-type: none"> • Moving away - Creating distance from and pushing others away • Moving against - Managing situations by manipulating or controlling others • Moving toward - Building alliances through followership behaviors <p>☞ The number in the middle is the team’s average percentile score.</p> </div> <p>No animations</p>
<p>Facilitator note</p> <p>Say “There are 11 derailers, and they can be grouped into three major clusters:</p> <p><i>MOVING AWAY. When stressed, people with these derailers may be moody, sensitive to perceived slights, fearful of making mistakes, or mistrusting of others.</i></p> <p><i>MOVING AGAINST. When stressed, people with these derailers may destabilize teams by dominating agendas, testing limits, or distracting colleagues.</i></p> <p><i>MOVING TOWARD. When stressed, people with these derailers may pay excessive attention to detail or to the needs and directives of their supervisors.”</i></p>			<p>Slide 24</p> <div data-bbox="922 1184 1409 1457"> <p>INTERPRETING TEAM DERAILER SCORES</p> <p>☞ Percentile scores above the 80% are shaded in red to indicate that the derailer represents a high risk for the team.</p> <p>☞ The numbers outside each circle represent the number of team members at each risk level on the derailer.</p> <p>☞ Risk levels are divided into quartiles</p> <ul style="list-style-type: none"> • 1st quartile - no risk (lightest shading) • 2nd quartile - low risk • 3rd quartile - moderate risk • 4th quartile - high risk (darkest shading) </div> <p>No animations</p>

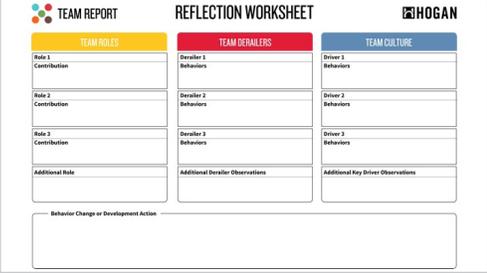


TOPIC/CONTENT	PRESENTATION METHOD	TIME	RESOURCES
<p>Module 3: Team Derailers</p>	<p>Instructor Presentation Group Discussion</p>	<p>45 min</p>	<p>Slides Reflection Worksheets Team Reports</p>
<p>Facilitator note Have participants look at page 10 of their reports.</p>	<p>Presentation note Say “In this exercise, you are going to discuss the assessment results associated with the team’s key derailers and the implications those results have for your team.” <i>Follow directions, 1 through 6.</i></p>		<p>Slide 25</p> <p>No animations</p>
<p>Facilitator note Make sure participants have a copy of their Reflection Worksheets.</p>	<p>Presentation note <i>Read the directions for Self-Reflection Time, ask for questions, then time the activity.</i> <i>Advance to next slide (#27).</i></p>		<p>Slide 26</p> <p>No animations</p>



TOPIC/CONTENT	PRESENTATION METHOD	TIME	RESOURCES
<p>Module 3: Team Derailers</p>	<p>Instructor Presentation Group Discussion</p>	<p>45 min</p>	<p>Slides Reflection Worksheets Team Reports</p>
<p>Facilitator note</p> <p>Make sure participants have a copy of their Reflection Worksheets.</p> <p>Allow 10 minutes to complete.</p>	<p>Presentation note</p> <p><i>Time the activity.</i></p>		<p>Slide 27</p> <div data-bbox="927 537 1414 810" style="border: 1px solid gray; padding: 10px;"> <p>SELF REFLECTION TIME</p> <p>Team Derailers</p> <p>Based on your individual scores on Key Derailers</p> <p>1 Using the Reflection Worksheet provided by the facilitator, list the top 1-3 Derailers for which you are considered to be "high risk" for exhibiting behaviors that contribute to the team Key Derailer (High Risk is indicated by a bold red color).</p> <p>2 Below each Derailer you list, describe what you believe to be the behaviors you exhibit that might contribute to the Key Derailer.</p> <p>3 If you have any additional Derailer observations, describe them in the space provided.</p> <p><small>Note: If you do not contribute to any of the Key Derailers, list and describe any Derailers and associated behaviors that you think you may exhibit that could inhibit team performance.</small></p> <p>Questions?</p> </div> <p>No animations</p>



TOPIC/CONTENT	PRESENTATION METHOD	TIME	RESOURCES
<p>Module 4: Team Culture</p>	<p>Instructor Presentation Table Discussion</p>	<p>45 min</p>	<p>Slides Reflection Worksheets Team Reports</p>
<p>Facilitator note</p> <p>The Team Culture section of the report is derived from the MVPI, which identifies values (“drivers”), motives, and aspirations.</p>	<p>Presentation note</p> <p>Say “Team members all have their own individual values and drivers that guide self-focus and priorities. When a majority of team members share the same value, either high or low, the team bonds more easily.”</p>		<p>Slide 28</p>  <p>No animations</p>
<p>Facilitator note</p> <p>Tip: research shows that group cohesion is higher in senior leadership groups who have shared values.</p>	<p>Presentation note</p> <p>Say “This section highlights the team’s shared values. Because values provide a foundation for team norms, culture, and goal alignment, shared values can facilitate team performance.”</p> <p><i>Read and paraphrase bullet points.</i></p>		<p>Slide 29</p>  <p>No animations</p>

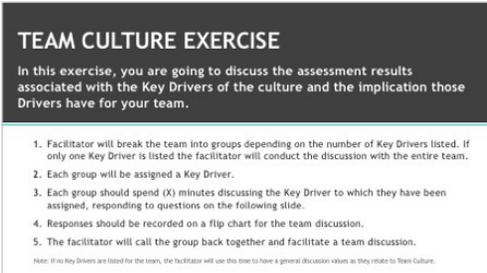


TOPIC/CONTENT	PRESENTATION METHOD	TIME	RESOURCES
<p>Module 4: Team Culture</p>	<p>Instructor Presentation Table Discussion</p>	<p>45 min</p>	<p>Slides Reflection Worksheets Team Reports</p>
<p>Facilitator note</p> <p>Values shared by more than half of team members represent key drivers for the team.</p> <p>Please note that a team can share a value in the high range or in the low range; they may be highly motivated by a certain value, or they may be quite indifferent to it.</p>	<p>Presentation note</p> <p>Say “The Hogan Team Report classifies values into one of four broad groups.”</p> <p><i>Have participants look at slide 7 (average team driver percentiles) and 8 (key drivers).</i></p>		<p>Slide 30</p> <div data-bbox="922 575 1414 852" style="border: 1px solid black; padding: 10px;"> <p>TEAM CULTURE OVERVIEW</p> <ul style="list-style-type: none"> ✦ The actions of team members are guided to large extent by their values. ✦ Values influence the choices or decisions made by team members and, therefore, shape the Team Culture and sense of shared purpose. ✦ The influence that values have can often be at the subconscious level. ✦ Team members may have limited awareness regarding the impact that values have on guiding their actions. ✦ When team member values are aligned, it “anchors” the team and can increase the likelihood of successful team performance. <ul style="list-style-type: none"> ✦ When team values align with the broader organization’s business strategy and objectives team productivity is likely increased. ✦ 100% alignment is untenable, but alignment on key values is essential to team cohesion.  </div> <p>No animations</p>
<p>Presentation note</p> <p>Say “The Hogan Team Report classifies values into one of four broad groups:</p> <p>Status values are those concerned with standing out from the crowd and being noticed, achievements, progression, and position.</p> <p>Social values are those concerned with a focus on people, and in being gregarious and/or altruistic, having certain expectations of how to behave towards each other.</p> <p>Financial values are those concerned with prioritizing commercial issues, seeking stability, or maximizing financial gain.</p> <p>Decision values are those concerned with ideas, style and presentation, and/or focus on data and analysis for making decisions.”</p>			<p>Slide 31</p> <div data-bbox="922 1188 1414 1465" style="border: 1px solid black; padding: 10px;"> <p>INTERPRETING TEAM CULTURE SCORES</p> <ul style="list-style-type: none"> ✦ The scales are arranged according to four value clusters <ul style="list-style-type: none"> • Status - Values associated with “getting ahead,” achievement and accomplishment • Social - Values associated with “getting along” with and proper treatment of people • Financial - Values associated with creating order, minimizing risk and maximizing gain • Decisions - Values associated with creating meaning from surroundings and making decisions using intuition, data and facts, or both ✦ The number in the middle is the team’s average percentile score. <div style="text-align: center; margin-top: 10px;"> <p>SCALE CLUSTER MVPPI SCALE</p>  </div> </div> <p>No animations</p>



TOPIC/CONTENT	PRESENTATION METHOD	TIME	RESOURCES																								
Module 4: Team Culture	Instructor Presentation Table Discussion	45 min	Slides Reflection Worksheets Team Reports																								
Facilitator note	Presentation note		<p>Slide 32</p> <div data-bbox="927 590 1414 863"> <p>INTERPRETING TEAM CULTURE SCORES</p> <ul style="list-style-type: none"> ✦ Values shared by at least two-thirds of team members are shaded in blue and represent Key Drivers. ✦ The numbers outside each circle represent the number of team members scoring in each quartile. <p>The quartiles are divided by percentages shaded from light to dark 1st quartile - 0-24% (lightest shading) 2nd quartile - 25-49% 3rd quartile - 50-74% 4th quartile - 75-100% (darkest shading)</p> <table border="1"> <thead> <tr> <th>SCALE CLUSTER</th> <th>MVPI SCALE</th> </tr> </thead> <tbody> <tr> <td>STATUS People who take the lead, drive results, and focus on their achievements, accomplishments, progress, and status.</td> <td>RECOGNITION 50</td> </tr> <tr> <td>POWER</td> <td>21</td> </tr> <tr> <td>HEDONISM</td> <td>83</td> </tr> </tbody> </table> </div> <p>No animations</p>	SCALE CLUSTER	MVPI SCALE	STATUS People who take the lead, drive results, and focus on their achievements, accomplishments, progress, and status.	RECOGNITION 50	POWER	21	HEDONISM	83																
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Facilitator note	Presentation note		<p>Slide 33</p> <div data-bbox="927 1163 1414 1436"> <p>TEAM CULTURE</p> <table border="1"> <tbody> <tr> <td>Recognition</td> <td>Responsive to attention, approval, praise, and recognition</td> <td rowspan="3">Status</td> </tr> <tr> <td>Power</td> <td>Desires success, accomplishment, status, and competition</td> </tr> <tr> <td>Hedonism</td> <td>Motivated by fun, pleasure, and good company</td> </tr> <tr> <td>Altruistic</td> <td>Concerned for the less fortunate and improving society</td> <td rowspan="2">Social</td> </tr> <tr> <td>Affiliation</td> <td>Enjoys frequent and varied social interaction</td> </tr> <tr> <td>Tradition</td> <td>Dedicated to established procedures and conservative values</td> <td rowspan="3">Financial</td> </tr> <tr> <td>Security</td> <td>Desires certainty, predictability, order, and control in their lives</td> </tr> <tr> <td>Commerce</td> <td>Interested in financial and business-related matters and money</td> </tr> <tr> <td>Aesthetics</td> <td>Interested in culture, good taste, and attractive surroundings</td> <td rowspan="2">Decisions</td> </tr> <tr> <td>Science</td> <td>Desires knowledge and the pursuit of data</td> </tr> </tbody> </table> <p>TEAM REPORT DEQUEAN</p> </div> <p>No animations</p>	Recognition	Responsive to attention, approval, praise, and recognition	Status	Power	Desires success, accomplishment, status, and competition	Hedonism	Motivated by fun, pleasure, and good company	Altruistic	Concerned for the less fortunate and improving society	Social	Affiliation	Enjoys frequent and varied social interaction	Tradition	Dedicated to established procedures and conservative values	Financial	Security	Desires certainty, predictability, order, and control in their lives	Commerce	Interested in financial and business-related matters and money	Aesthetics	Interested in culture, good taste, and attractive surroundings	Decisions	Science	Desires knowledge and the pursuit of data
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TOPIC/CONTENT	PRESENTATION METHOD	TIME	RESOURCES
Module 4: Team Culture	Instructor Presentation Table Discussion	45 min	Slides Reflection Worksheets Team Reports
	<p>Presentation note</p> <p>Say “In this exercise, you are going to discuss the assessment results associated with the team’s key drivers and the implication those results have for your team.”</p> <p><i>Follow directions, 1 through 5.</i></p> <p><i>Time the activity.</i></p>		<p>Slide 34</p>  <p>No animations</p>
<p>Facilitator note</p> <p>If the team has no shared values, it may sometimes clash over priorities or drivers held by individual team members.</p> <p>However, too many shared values may lead to groupthink if the group shares a collective bias for some things over others.</p>	<p>Presentation note</p> <p>Say “Let’s answer some questions about team culture.”</p> <p><i>Ask the bulleted questions and post/discuss answers.</i></p>		<p>Slide 35</p>  <p>No animations</p>

Case Study Example: A group of VP/general managers, each overseeing a country business unit, all reported to the global CEO of a chemical company (the team leader). All of the GMs had begun their careers in R&D roles and had gradually advanced within the organization to their current position. The CEO was an external hire whose background was in business administration. Out of the 20 individuals making up this team, 19 scored high on the Science scale. The remaining individual scored quite low. Once the CEO/team leader’s profile was presented, it was discovered he was the low-scoring individual. A GM announced his conclusion: “No wonder he doesn’t read my emails that provide all the data...” A discussion on communication effectiveness within the team and down the hierarchy ensued. The results of this discussion were integrated with the Team Development Plan.



TOPIC/CONTENT	PRESENTATION METHOD	TIME	RESOURCES															
<p>Module 4: Team Culture</p>	<p>Instructor Presentation Table Discussion</p>	<p>45 min</p>	<p>Slides Reflection Worksheets Team Reports</p>															
<p>Facilitator note Make sure participants have their Reflection Worksheets.</p>	<p>Presentation note <i>Read the directions for Self-Reflection Time, ask for questions, then time the activity.</i> <i>Advance to next slide (#35).</i></p>		<p>Slide 36</p> <div data-bbox="927 537 1414 814" style="border: 1px solid black; padding: 10px;"> <p>SELF REFLECTION TIME Team Culture</p> <p>Based on your individual scores on Team Culture</p> <ol style="list-style-type: none"> 1 Using the Reflection Worksheet provided by the facilitator, list the top 1-3 Key Drivers for which you contribute the most to the team based on the assessment results (Key contribution is indicated by a bold blue color). 2 Below each Driver you list, describe what you believe to be the important behaviors you exhibit with respect to the Driver. 3 If you have any additional Key Driver observations describe them in the space provided. <p><small>Note: If you do not contribute to any of the Key Drivers, list and describe any Drivers (and associated behaviors) that you think you may exhibit that could contribute to team performance.</small></p> <p style="text-align: center;">Questions?</p> </div> <p>No animations</p>															
<p>Facilitator note Appendix A.</p>	<p>Presentation note <i>Time the activity.</i></p>		<p>Slide 37</p> <div data-bbox="927 1024 1414 1299" style="border: 1px solid black; padding: 10px;"> <p style="display: flex; justify-content: space-between;">TEAM REPORTREFLECTION WORKSHEETHOGAN</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="background-color: #FFD700;">TEAM ROLES</th> <th style="background-color: #DC143C;">TEAM DETAILERS</th> <th style="background-color: #4682B4;">TEAM CULTURE</th> </tr> </thead> <tbody> <tr> <td>Role 1 Contribution</td> <td>Detailer 1 Behaviors</td> <td>Driver 1 Behaviors</td> </tr> <tr> <td>Role 2 Contribution</td> <td>Detailer 2 Behaviors</td> <td>Driver 2 Behaviors</td> </tr> <tr> <td>Role 3 Contribution</td> <td>Detailer 3 Behaviors</td> <td>Driver 3 Behaviors</td> </tr> <tr> <td>Additional Role</td> <td>Additional Detailer Observations</td> <td>Additional Key Driver Observations</td> </tr> </tbody> </table> <p>Behavior Change or Development Action</p> </div> <p>No animations</p>	TEAM ROLES	TEAM DETAILERS	TEAM CULTURE	Role 1 Contribution	Detailer 1 Behaviors	Driver 1 Behaviors	Role 2 Contribution	Detailer 2 Behaviors	Driver 2 Behaviors	Role 3 Contribution	Detailer 3 Behaviors	Driver 3 Behaviors	Additional Role	Additional Detailer Observations	Additional Key Driver Observations
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TOPIC/CONTENT	PRESENTATION METHOD	TIME	RESOURCES						
<p align="center">Module 5: Development Planning</p>	<p>Instructor Presentation Group Discussion</p>	<p>90 min</p>	<p>Slides Worksheets: Goal, Critical Path, Team Score Team Reports</p>						
	<p>Presentation note Say “Now, let’s take our team data and use it for our development planning and action steps.”</p>		<p>Slide 38</p> <div style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> </div> <p>No animations</p>						
<p>Facilitator note This customized slide should be identical to slide 13.</p>	<p>Presentation note Say “Again, here are our team’s dominant team Roles, Team Derailers, and Key Drivers for our Team Culture. We will use these to help formulate our development planning.”</p>		<p>Slide 39</p> <div style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p align="center">FORESHADOWING THE TEAM THEMES</p> <table border="0"> <tr> <td style="border-right: 1px solid #ccc; padding-right: 5px;"> <p>Team Roles The team has a high percentage of members who fulfill the PRAGMATISM role. The team approaches work with a practical, real world orientation. The team has a low percentage of members fulfilling all other roles which may suggest a degree of imbalance.</p> </td> <td style="background-color: #333; color: white; padding: 5px; text-align: center;"> Theme 1 </td> </tr> <tr> <td style="border-right: 1px solid #ccc; padding-right: 5px;"> <p>Team Derailers The team has three potential key derailers including LEISURELY, EXCITABLE, RESERVED. These derailers suggest that the team may isolate itself at times and others (outside the team) may find the team to be somewhat insular and difficult to approach.</p> </td> <td style="background-color: #333; color: white; padding: 5px; text-align: center;"> Theme 2 </td> </tr> <tr> <td style="border-right: 1px solid #ccc; padding-right: 5px;"> <p>Team Culture The team has three key value drivers including HEDONISM, POWER, and COMMERCE. These values suggest a team that likes to be in control of its destiny, uses commercial performance as yardstick of success and promotes a work hard - play hard atmosphere.</p> </td> <td style="background-color: #333; color: white; padding: 5px; text-align: center;"> Theme 3 </td> </tr> </table> </div> <p>No animations</p>	<p>Team Roles The team has a high percentage of members who fulfill the PRAGMATISM role. The team approaches work with a practical, real world orientation. The team has a low percentage of members fulfilling all other roles which may suggest a degree of imbalance.</p>	Theme 1	<p>Team Derailers The team has three potential key derailers including LEISURELY, EXCITABLE, RESERVED. These derailers suggest that the team may isolate itself at times and others (outside the team) may find the team to be somewhat insular and difficult to approach.</p>	Theme 2	<p>Team Culture The team has three key value drivers including HEDONISM, POWER, and COMMERCE. These values suggest a team that likes to be in control of its destiny, uses commercial performance as yardstick of success and promotes a work hard - play hard atmosphere.</p>	Theme 3
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TOPIC/CONTENT	PRESENTATION METHOD	TIME	RESOURCES
<p>Module 5: Development Planning</p>	<p>Instructor Presentation Group Discussion</p>	<p>90 min</p>	<p>Slides Worksheets: Goal, Critical Path, Team Score Team Reports</p>
	<p>Presentation note</p> <p>Say “Here’s a process map of next steps--let’s combine our team themes and other team data to formulate dominant data themes. Then, in light of important organizational goals, let’s develop an initial action plan and capture that in a dynamic scorecard.”</p>		<p>Slide 40</p> <div data-bbox="927 531 1414 806"> <p>The diagram illustrates the team development process. It starts with two input boxes: 'Team Themes' (light blue) and 'Other Team Data' (light blue). These feed into a central red circle labeled 'Data Themes'. Below 'Data Themes' is another red circle labeled 'Goals'. Arrows from 'Goals' point to two yellow boxes: 'Initial Action Plan' on the left and 'Initial Scorecard' on the right. A double-headed arrow connects these two boxes. Small logos for 'TEAM REPORT' and 'ORGSAN' are visible at the bottom corners of the diagram.</p> </div> <p>No animations</p>
	<p>Presentation note</p> <p>Say “What are the top three areas that the team needs to address to improve team performance?”</p> <p><i>Capture and post these top three areas of team improvement.</i></p>		<p>Slide 41</p> <div data-bbox="927 1010 1414 1283"> <p>The diagram is titled 'GROUP DISCUSSION'. It begins with the text 'Based on:'. Below this are two numbered items in a list: '1 Team Themes' and '2 Other Team Data'. Below the list is a question: 'What are the top three areas that the team needs to address to improve team performance?'</p> </div> <p>No animations</p>



TOPIC/CONTENT	PRESENTATION METHOD	TIME	RESOURCES								
<p align="center">Module 5: Development Planning</p>	<p>Instructor Presentation Group Discussion</p>	<p>90 min</p>	<p align="center">Slides Worksheets: Goal, Critical Path, Team Score Team Reports</p>								
<p>Facilitator note Provide Goal Worksheet posters to each group.</p>	<p>Presentation note <i>Exercise: read and follow steps 1 – 4. Time the activity and reconvene large group.</i></p>		<p>Slide 42</p> <div style="border: 1px solid #ccc; padding: 10px;"> <p align="center">GOAL WORKSHEET EXERCISE</p> <p>In this exercise, you are going to review the discussion points related to the areas that the team needs to address to improve team performance and complete a Goal Worksheet for each area.</p> <ol style="list-style-type: none"> <li style="margin-bottom: 5px;">1 Break into small groups according to the facilitator's instructions. <li style="margin-bottom: 5px;">2 In your group, review the discussion points related to your assigned team "area for improvement." <li style="margin-bottom: 5px;">3 Complete the Goal Worksheet poster page provided by the facilitator. <li style="margin-bottom: 5px;">4 Be prepared to discuss your results with the team. </div> <p>No animations</p>								
<p>Facilitator note Appendix B.</p>	<p>Presentation note <i>The facilitator will call the group back together and facilitate a dialogue in which each team member has an opportunity to discuss their individual commitments.</i></p>		<p>Slide 43</p> <div style="border: 1px solid #ccc; padding: 10px;"> <p align="center">GOAL WORKSHEET</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td colspan="2">Underlying Theme(s) or Data:</td> </tr> <tr> <td colspan="2">Goal:</td> </tr> <tr> <td style="width: 50%;">Current behavior</td> <td style="width: 50%;">Future Behavior</td> </tr> <tr> <td colspan="2">Success Measure:</td> </tr> </table> </div> <p>No animations</p>	Underlying Theme(s) or Data:		Goal:		Current behavior	Future Behavior	Success Measure:	
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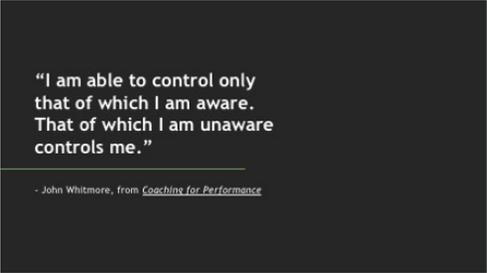


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<p>Facilitator note</p> <p>Set up post- workshop review. Distribute Critical Path Worksheets and Team Scorecards.</p>	<p>Presentation note</p> <p>Identify two activities to improve team performance as a post-workshop plan. Read the two bullet points to explain. <i>Advance to slides 45 and 46.</i></p>		<p>Slide 44</p> <div style="border: 1px solid black; padding: 10px;"> <p align="center">POST - WORKSHOP TEAM DEVELOPMENT ACTIVITIES</p> <p>Following the workshop, two activities can contribute to improving team performance:</p> <ul style="list-style-type: none"> ✦ A sub-group of team members can be assigned to each goal and charged with developing and implementing an action plan designed to accomplish the goal. Sample 1 - 12 Month Critical Path Worksheet illustrates a planning tool for this purpose. ✦ The team can develop a Team Score Card (see sample 2) to chart team progress over a specific time period. The score card can incorporate team improvement areas as well as other team metrics. </div> <p>No animations</p>																																																																																				
<p>Facilitator note</p> <p>Appendix B.</p>	<p>Presentation note</p> <p><i>Begin program and advance to next slide.</i></p>		<p>Slide 45</p> <div style="border: 1px solid black; padding: 10px;"> <p>SAMPLE 1 12 Month Critical Path Worksheet</p> <p>Goal: Champion: Proposed Team Members: Key Stakeholders: Resources Needed:</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Milestone</th> <th>Jan</th> <th>Feb</th> <th>Mar</th> <th>Apr</th> <th>May</th> <th>Jun</th> <th>Jul</th> <th>Aug</th> <th>Sep</th> <th>Oct</th> <th>Nov</th> <th>Dec</th> <th>Target Date</th> </tr> </thead> <tbody> <tr> <td>1.</td> <td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td> </tr> <tr> <td>2.</td> <td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td> </tr> <tr> <td>3.</td> <td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td> </tr> <tr> <td>4.</td> <td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td> </tr> <tr> <td>5.</td> <td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td> </tr> </tbody> </table> </div> <p>No animations</p>	Milestone	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Target Date	1.														2.														3.														4.														5.													
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<p>Facilitator note Appendix B.</p>			<p>Slide 46</p> <div style="border: 1px solid black; padding: 10px;"> <p>SAMPLE 2 Team Score Card</p> <p>Team Score Card is a simple mechanism for ensuring accountability and maintaining a regular line of sight to progress:</p> <ul style="list-style-type: none"> ✘ Can include business and team performance goals ✘ Rating process does not have to be complicated ✘ Completed and discussed regularly by the team ✘ Can be used to communicate to a broader audience <table border="1" style="width: 100%; border-collapse: collapse; text-align: center;"> <thead> <tr> <th rowspan="2">Challenge</th> <th colspan="5">Rating</th> </tr> <tr> <th>Low</th> <th>2</th> <th>3</th> <th>4</th> <th>High</th> </tr> </thead> <tbody> <tr> <td colspan="6">Business Challenges</td> </tr> <tr> <td>Challenge 1:</td> <td>1</td> <td>2</td> <td>3</td> <td>4</td> <td>5</td> </tr> <tr> <td>Challenge 2:</td> <td>1</td> <td>2</td> <td>3</td> <td>4</td> <td>5</td> </tr> <tr> <td>Challenge 3:</td> <td>1</td> <td>2</td> <td>3</td> <td>4</td> <td>5</td> </tr> <tr> <td colspan="6">Performance Challenges</td> </tr> <tr> <td>Challenge 1:</td> <td>1</td> <td>2</td> <td>3</td> <td>4</td> <td>5</td> </tr> <tr> <td>Challenge 2:</td> <td>1</td> <td>2</td> <td>3</td> <td>4</td> <td>5</td> </tr> <tr> <td>Challenge 3:</td> <td>1</td> <td>2</td> <td>3</td> <td>4</td> <td>5</td> </tr> <tr> <td colspan="6">Overall</td> </tr> <tr> <td>Area 1:</td> <td>1</td> <td>2</td> <td>3</td> <td>4</td> <td>5</td> </tr> <tr> <td>Area 2:</td> <td>1</td> <td>2</td> <td>3</td> <td>4</td> <td>5</td> </tr> <tr> <td>Area 3:</td> <td>1</td> <td>2</td> <td>3</td> <td>4</td> <td>5</td> </tr> </tbody> </table> </div> <p>No animations</p>	Challenge	Rating					Low	2	3	4	High	Business Challenges						Challenge 1:	1	2	3	4	5	Challenge 2:	1	2	3	4	5	Challenge 3:	1	2	3	4	5	Performance Challenges						Challenge 1:	1	2	3	4	5	Challenge 2:	1	2	3	4	5	Challenge 3:	1	2	3	4	5	Overall						Area 1:	1	2	3	4	5	Area 2:	1	2	3	4	5	Area 3:	1	2	3	4	5
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TOPIC/CONTENT	PRESENTATION METHOD	TIME	RESOURCES
Module 6: Individual Development Planning	Instructor Presentation Group Discussion	60 min	Slides Reflection Worksheets Team Reports
<p>Facilitator note</p> <p>Tip: Strategic self-awareness has two components:</p> <ol style="list-style-type: none"> 1. Understanding one's limitations and strengths 2. Understanding how they compare with those of others 	<p>Presentation note</p> <p>Say "We have spent the bulk of our time focusing on team analysis. We have reviewed and discussed Team Report data, and we have systematically related that to goals that will help us be successful in our performance objectives. This section of the workshop will focus more on you as an individual, still part of a team, but with a focus on individual development."</p>		<p>Slide 47</p>  <p>No animations</p>
	<p>Presentation note</p> <p>Say "The literature on management is replete with differences between leaders and managers who are self-aware and receptive to feedback and those who are not.</p> <p>Leaders who know themselves seek feedback in multiple forms, accept feedback, are more successful than those who don't, and act on the feedback.</p> <p>Leaders who lack awareness miss feedback messages (blind spots), ignore feedback they do receive (denial), are slow to change over time (obstinate), and top-out or derail (fail)."</p>		<p>Slide 48</p>  <p>No animations</p>



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	<p>Presentation note</p> <p>Say “Let’s now focus on your own individual profiles. The Team Report, pages 9, 10, and 11, contains your individual scores.”</p> <p><i>Review steps 1 – 5, then advance to slide 50.</i></p>		<p>Slide 49</p> <div data-bbox="922 569 1409 842" style="border: 1px solid black; padding: 10px;"> <p>INDIVIDUAL DEVELOPMENT EXERCISE</p> <p>In this exercise, you are going to identify individual behavior changes or development actions you intend to take to improve team performance.</p> <ol style="list-style-type: none"> 1 Review the Reflection Worksheet you completed throughout this workshop. 2 In the last section of the worksheet, record any behavior changes or development actions you will take to improve team performance. 3 Be prepared to share your proposed behavior changes or development actions with the team. 4 The facilitator will give team members (X) minutes to complete steps 1-3. 5 The facilitator will call the group back together and facilitate a dialogue in which each team member has an opportunity to discuss their individual commitments. <p><small>Note: If no Key Drivers are listed for the team, the facilitator will use this time to have a general discussion about what is relevant to Team Culture.</small></p> <p><small>© TEAM REPORT HOGAN</small></p> </div> <p>No animations</p>																																	
<p>Facilitator note</p> <p>Reference note: Appendix D has a one-page summary of the Hogan scale definitions.</p>	<p>Presentation note</p> <p><i>Time this activity.</i></p> <p><i>Convene group members and facilitate a dialogue in which each team member has an opportunity to discuss their individual commitments.</i></p>		<p>Slide 50</p> <div data-bbox="922 1163 1409 1436" style="border: 1px solid black; padding: 10px;"> <p>TEAM REPORT REFLECTION WORKSHEET HOGAN</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="background-color: #FFD700;">TEAM ROLES</th> <th style="background-color: #DC143C;">TEAM DERAILERS</th> <th style="background-color: #4682B4;">TEAM CULTURE</th> </tr> </thead> <tbody> <tr> <td> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td>Role 1</td><td>Contribution</td></tr> <tr><td>Role 2</td><td>Contribution</td></tr> <tr><td>Role 3</td><td>Contribution</td></tr> <tr><td>Additional Role</td><td></td></tr> </table> </td> <td> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td>Derailer 1</td><td>Behaviors</td></tr> <tr><td>Derailer 2</td><td>Behaviors</td></tr> <tr><td>Derailer 3</td><td>Behaviors</td></tr> <tr><td>Additional Derailer Observations</td><td></td></tr> </table> </td> <td> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td>Driver 1</td><td>Behaviors</td></tr> <tr><td>Driver 2</td><td>Behaviors</td></tr> <tr><td>Driver 3</td><td>Behaviors</td></tr> <tr><td>Additional Key Driver Observations</td><td></td></tr> </table> </td> </tr> <tr> <td colspan="3" style="padding-top: 10px;"> <p>Behavior Change or Development Action</p> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> </td> </tr> </tbody> </table> </div> <p>No animations</p>	TEAM ROLES	TEAM DERAILERS	TEAM CULTURE	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td>Role 1</td><td>Contribution</td></tr> <tr><td>Role 2</td><td>Contribution</td></tr> <tr><td>Role 3</td><td>Contribution</td></tr> <tr><td>Additional Role</td><td></td></tr> </table>	Role 1	Contribution	Role 2	Contribution	Role 3	Contribution	Additional Role		<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td>Derailer 1</td><td>Behaviors</td></tr> <tr><td>Derailer 2</td><td>Behaviors</td></tr> <tr><td>Derailer 3</td><td>Behaviors</td></tr> <tr><td>Additional Derailer Observations</td><td></td></tr> </table>	Derailer 1	Behaviors	Derailer 2	Behaviors	Derailer 3	Behaviors	Additional Derailer Observations		<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td>Driver 1</td><td>Behaviors</td></tr> <tr><td>Driver 2</td><td>Behaviors</td></tr> <tr><td>Driver 3</td><td>Behaviors</td></tr> <tr><td>Additional Key Driver Observations</td><td></td></tr> </table>	Driver 1	Behaviors	Driver 2	Behaviors	Driver 3	Behaviors	Additional Key Driver Observations		<p>Behavior Change or Development Action</p> <div style="border: 1px solid black; height: 20px; width: 100%;"></div>		
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<p>Module 6: Individual Development Planning</p>	<p>Instructor Presentation Group Discussion</p>	<p>60 min</p>	<p>Slides Reflection Worksheets Team Reports</p>
<p>Facilitator note Close session by reiterating next steps.</p>	<p>Presentation note <i>Summarize results of the workshop and identify the bulleted follow-up items and date for a review of progress.</i></p>		<p>Slide 51</p> <div data-bbox="927 564 1414 837" style="border: 1px solid gray; padding: 10px;"> <p>POTENTIAL NEXT STEPS</p> <ul style="list-style-type: none"> ✦ Summarize results of the workshop ✦ Develop the goal worksheets into action plans ✦ Develop Team Score Card ✦ Set a date & time to meet and review progress ✦ Update individual development plans ✦ Other? </div> <p>No animations</p>



APPENDIX A



TEAM REPORT

REFLECTION WORKSHEET



TEAM ROLES		
Role 1		
Contribution		
Role 2		
Contribution		
Role 3		
Contribution		
Additional Role		
TEAM DERAILERS		
Derailer 1		
Behaviors		
Derailer 2		
Behaviors		
Derailer 3		
Behaviors		
Additional Derailer Observations		
TEAM CULTURE		
Driver 1		
Behaviors		
Driver 2		
Behaviors		
Driver 3		
Behaviors		
Additional Key Driver Observations		

Behavior Change or Development Action



APPENDIX B

GOAL WORKSHEET

Underlying Theme(s) or Data:

Goal:

Current Behavior:

-
-
-
-

Future Behavior:

-
-
-
-

Success Measure:



APPENDIX B

SAMPLE 1 – 12-MONTH CRITICAL PATH WORKSHEET

Goal:

Champion:

Proposed Team Members:

Key Stakeholders:

Resources Needed:

	Milestone	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Target Date
1.														
2.														
3.														
4.														
5.														



APPENDIX B

SAMPLE TEAM SCORECARD

Challenge	Rating				
	Low				High
Business Challenges					
Challenge 1	1	2	3	4	5
Challenge 2	1	2	3	4	5
Challenge 3	1	2	3	4	5
Performance Challenges					
Challenge 1	1	2	3	4	5
Challenge 2	1	2	3	4	5
Challenge 3	1	2	3	4	5
Overall					
Area 1	1	2	3	4	5
Area 2	1	2	3	4	5
Area 3	1	2	3	4	5



APPENDIX C

EXAMPLE: PRE-SESSION TEAM QUESTIONNAIRE

	Rarely	Sometimes	Usually
1. Team members are passionate and unguarded in their discussion of issues.	_____	_____	_____
2. Team members call out one another's deficiencies or unproductive behaviors.	_____	_____	_____
3. Team members know what their peers are working on and how they contribute to the collective good of the team.	_____	_____	_____
4. Team members quickly and genuinely apologize to one another when they say or do something inappropriate or possibly damaging to the team.	_____	_____	_____
5. Team members willingly make sacrifices in their areas of expertise for the good of the team.	_____	_____	_____
6. Team members openly admit their weaknesses and mistakes.	_____	_____	_____
7. Team meetings are compelling, not boring.	_____	_____	_____
8. Team members leave meetings confident that their peers are completely committed to the decisions that were agreed on, even if there was initial disagreement.	_____	_____	_____
9. Morale is significantly affected by the failure to achieve team goals.	_____	_____	_____
10. During team meetings, the most important and difficult issues are put on the table to be resolved.	_____	_____	_____
11. Team members are deeply concerned about the prospect of letting down their peers.	_____	_____	_____
12. Team members know about one another's personal lives and are comfortable discussing them.	_____	_____	_____
13. Team members end discussions with clear and specific resolutions and calls to action	_____	_____	_____

Note: Adapted from Patrick Lencioni's "The Five Dysfunctions of a Team"



APPENDIX C

ANSWER KEY FOR 5 TEAM DYSFUNCTIONS

Dysfunction #1: Absence of Trust

This occurs when team members are reluctant to be vulnerable with one another and are unwilling to admit their mistakes, weaknesses, or needs for help. Without a certain comfort level among team members, a foundation of trust is impossible.

Questions keyed toward Trust: 4, 6, and 12

Dysfunction #2: Fear of Conflict

Teams that are lacking in Trust are incapable of engaging in unfiltered, passionate debate about key issues, causing situations where team conflict can easily turn into veiled discussions and back channel comments. In a work setting where team members do not openly air their opinions, inferior decisions are the result.

Questions keyed toward Conflict: 1, 7, and 10

Dysfunction #3: Lack of Commitment

Without Conflict, it is difficult for team members to commit to decisions, creating an environment where ambiguity prevails. Lack of direction and commitment can make employees, particularly star employees, disgruntled.

Questions keyed toward Commitment: 3, 8, and 13

Dysfunction #4: Avoidance of Accountability

When teams don't commit to a clear plan of action, even the most focused and driven individuals hesitate to call their peers on actions and behaviors that may seem counterproductive to the overall good of the team.

Questions keyed toward Accountability: 2, 9, and 14

Dysfunction #5: Inattention to Results Team

Members naturally tend to put their own needs (ego, career development, recognition, etc.) ahead of the collective goals of the team when individuals aren't held accountable. If a team has lost sight of the need for achievement, the business ultimately suffers.

Questions keyed toward Results: 5, 11, and 15



APPENDIX D

HOGAN SCALES: BRIEF DEFINITIONS

HPI

Adjustment	Composure, optimism, and stable moods
Ambition	Taking initiative, being competitive, and seeking leadership roles
Sociability	Seeming talkative, socially bold, and entertaining
Interpersonal Sensitivity	Being agreeable, considerate, and skilled at maintaining relationships
Prudence	Being conscientious, dependable, and rule-abiding
Inquisitive	Being curious, imaginative, visionary, and easily bored
Learning Approach	Enjoying formal education and staying up-to-date on business and technical matters

HDS

Excitable	Overly enthusiastic about people/projects, and then becoming disappointed with them
Skeptical	Socially insightful, but cynical and overly sensitive to criticism
Cautious	Overly worried about being criticized
Reserved	Lacking interest in or awareness of the feelings of others
Leisurely	Charming, but independent, stubborn, and hard to coach
Bold	Having inflated views of one's competency and worth
Mischievous	Charming, risk-taking, and excitement-seeking
Colorful	Dramatic, engaging, and attention-seeking
Imaginative	Thinking and acting in interesting, unusual, and even eccentric ways
Diligent	Conscientious, perfectionistic, and hard to please
Dutiful	Eager to please and reluctant to act independently

MVPI

Recognition	Desire to be known, seen, visible, and famous
Power	Desire for challenge, competition, achievement, and success
Hedonism	Desire for fun, excitement, variety, and pleasure
Altruistic	Desire to serve others, to improve society, and to help the less fortunate
Affiliation	Need for frequent and varied social contact
Tradition	Concerns for morality, family values, and devotion to duty
Security	Need for structure, order, and predictability
Commerce	Interest in earning money, realizing profits, and finding business opportunities
Aesthetics	Interest in the look, feel, sound, and design of products and artistic work
Science	Interest in new ideas, technology, and a rational, data-based approach to problem-solving