

**Name of Group/Department/Team**

**Kick Off Team Meeting**

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## **Why We're Here**

- Growing and changing organization, structure, and culture
- Different leader
- New team members
- Important to build a cohesive team and we're starting the process:
  - Learn more about each other – personally and professionally
  - Review the process of team development
  - Discuss expectations for the future
  - Confirm organizational and team goals, priorities, and responsibilities
  - Agree on how we'll work together to accomplish the goals
  - Understand each other's strengths, skills, and experience and also how we can help each other improve

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## What We'll Do

- 1) Get to know each other better, review stages of team development, and discuss next steps
- 2) Review and discuss thematic results from team survey (pre-work), share expectations
- 3) Confirm our goals, priorities, how progress will be measured, and who is doing what
- 4) Define our team norms/practices
- 5) Identify and better understand our strengths and skills and how we can help each other improve



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## NOTE TO FACILITATOR

- Choose and insert a teambuilding activity from the appendix here, or from the Effective Team Building Activities Guide
- Modify as needed given size of group

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## **Overview of Team Meeting Series**

Meeting #1 (this one): Overview of process, objectives, expectations, and 'Get to know you' activity

Meeting #2: Team building activity, review characteristics of high performing teams, review stages of team development model and actions to accelerate team performance

Meeting #3: Review results from team survey (which we'll complete this week) and discuss expectations

Meeting #4: Review business line and regional priorities. Discuss, clarify, and commit to team goals, metrics, and strategies to achieve the goals.

Meeting #5: Develop a team agreement, making team norms explicit

Meeting #6: Discuss strengths and development areas

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**Name of Group/Department/Team**  
**Team Meeting #2**

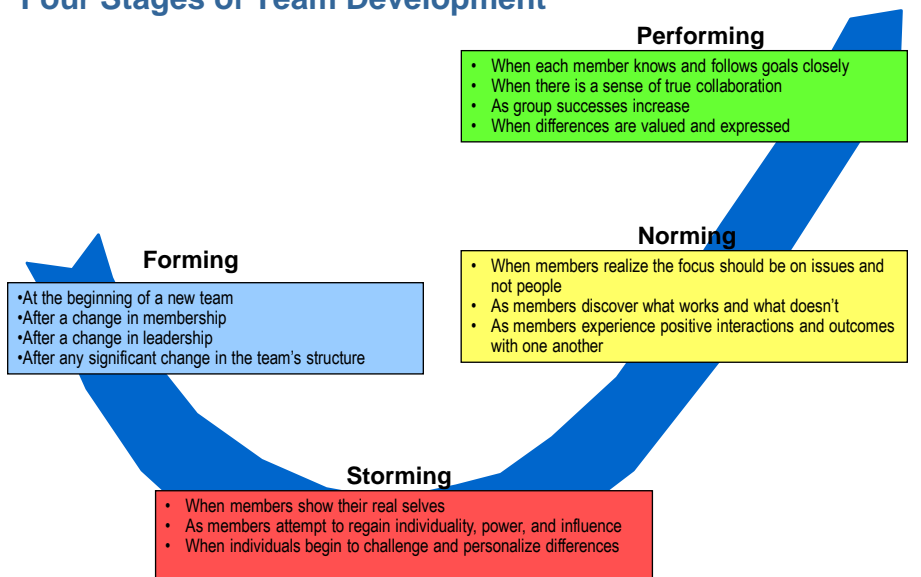
Date:

## NOTE TO FACILITATOR

- If you are running a 1-day meeting, skip this activity
- If this is the beginning of meeting #2, choose and insert a teambuilding activity from the appendix here

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## Four Stages of Team Development



Source: Tuckman  
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Team Development Model – W. Tuckman

- Questions?
- Concerns?
- Next steps:



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**Name of Group/Department/Team**  
**Team Meeting #3**

Date:

## Team Survey

### Questions asked (List the questions that were included):

1. Think back to when you heard that your new leader was going to be joining your team.
  - a) What things did you hope would stay the same?
  - b) What things did you hope would change?
2. What things have actually changed since his/her arrival?
3. What things have stayed the same?
4. In your opinion, how has the addition of your new leader gone thus far?
5. What do you most want/need from your new leader?
6. What does he/she need to know about you as an individual?
7. What does he/she need to know about the team?
8. What are the major business challenges you think he/she and the team will face in the next 6-12 months?
9. What are your specific suggestions for addressing these challenges?
10. What can your new leader expect from you?

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## Themes from Survey Results

- Add in a few slides to provide a high level summary of results – include a summary of responses for each of the survey questions

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## How to Accelerate our Team Performance

### Primary Tasks/Next Steps:

- Spend time together as a team and continue to learn more about each other – personally and professionally
- Learn from the past and best practices
- Discuss expectations for the future
- Confirm organizational and team goals and priorities and responsibilities
- Confirm organizational and team goals, priorities, and responsibilities  
and also how we can help each other improve

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- Questions?
- Concerns?
- Next steps:



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**Name of Group/Department/Team**  
**Team Meeting #4**

Date:

**Agenda**

- Review business line and regional goals and priorities
- Discuss how we can align and support those goals – Top goals/priorities for our team and how we'll measure success
- Confirm who is doing what
- Brainstorm strategies for achieving the goals
- Summarize agreements and next steps





## Strategies

### 1. Brainstorm as a team:

What do we need to:

- a) continue doing
- b) start doing
- c) stop doing

in order to achieve our team goals?

### 2. Summarize and agree on 5-6 specific things the team agrees to do

#### Ground Rules for Brainstorming

–Avoid criticizing ideas. Every idea is potentially a great one as long as it's clearly stated.

–Come up with as many ideas as possible as quickly as possible.

–Don't censor your ideas or anyone else's.

–Listen to others' ideas and consciously find a connection that you can build upon.

–Avoid any discussion about the merits of ideas. Discussions should only seek to clarify, not debate, ideas.

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- Questions?
- Concerns?
- Next steps:



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## How to Accelerate our Team Performance

### Primary Tasks/Next Steps:

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- Learn from the past and best practices
- Discuss expectations for the future
- Confirm organizational and team goals, priorities, and responsibilities
- Agree on how we'll work together to accomplish the goals
- Understand each other's strengths, skills, and experience and also how we can help each other improve
- Agree on how we'll work together to accomplish the goals

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**Name of Group/Department/Team**  
**Team Meeting #5**

Date:

## Our Team Agreement



**Objective:** Come up with a set of norms that specify what we as a team...

- Expect from one another
- Agree we will do
- What won't be allowed

**Guidelines:**

- We need to be clear and specific about the acceptable and non-acceptable behaviors
- Ultimately, we'll decide on no more than 8

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## Our Team Agreement

**Process:**

**Step 1: Briefly discuss:**

- What negative experiences have you had in previous teams that made working on those teams less satisfying?

**Step 2: Brainstorm ideas in answer to the following:**

- What are 1-2 things we must always do as we work together to be a truly great team?
- What is 1 thing we must never do -- for instance, a behavior that would keep us from using the full range of knowledge, skills, and experience
- And create a specific proposal that states:
- We all agree to...

**Step 3: Work together as a team to come to consensus on 7-8 things we will/will never do.**

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- Questions?
- Concerns?
- Next steps:



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**Name of Group/Department/Team**  
**Team Meeting #6**

Date:

## **What I Bring to the Team**

Objective: Share our strengths and improvement areas and learn more about how to support each other

Process:

Step 1: Individually, reflect on and write a couple of notes on the following:

- a) Why you were chosen for your position on the team
- b) 1-2 things you are really good at – your strengths
- c) 1-2 things you know you need to work on – your development areas or potential blind spots
- d) What you think other team members could do to help you be successful – with your development

Step 2: Each person shares their responses to a & b

Step 3: Each person shares their responses to c & d

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## **What's Next?**

- Follow up on assignments and commitments
- Team Review sessions
- Continued discussion and team building

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Thank You

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