

# Module 2

# Organizing Teams



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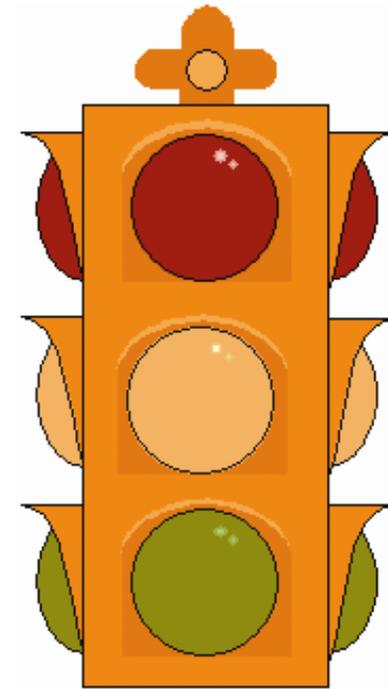
# Organizing Teams



# Team Charter



# Seven Keys to Success™



**What do the colors mean?**

**Red- urgent - corrective action required immediately**

**Yellow/Amber – warning - corrective action required in the near term**

**Green – on course - no corrective action required**

# Creating an Organized Team

**Purpose:** Form and organize a new team and create a Team Charter

**Process:**

Use Case Study and Team Charter handouts, assign project roles, an observer and a PM, and create Team Charter for case study.

**Participation:** Identified PM leads effort, others assume roles and support PM, team's choice on who will present products

**Products:**

- 1) One flip chart with your Team Charter for the case study
- 2) Comment on how your team organized itself, what you learned about forming and organizing teams, and how you think you could do better in the future

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# Team Charter Topics

## Some suggested topics:

- Time limit for discussions
- Decision-making process
- How to handle conflict
- How long team works, for example, into lunch, after 5:30
- How team deals with internal issues; for example, dominant or quiet team members
- Assign PM and backup for each module
- Assign roles and responsibilities
- A "Trigger" word to be used to gracefully disengage
- Develop a team name



# Team is High Performing

Team is high performing



## Healthy Signs

- Morale is good
- The team is diverse
- High energy and enthusiasm for the project

## Unhealthy Signs

- The tension can be felt
- Turnover is high
- Working conditions are poor

1. Breadth, depth and caliber of PM and team skills are appropriate for all phases.
2. Morale, motivation, energy, and collaboration across teams are high.
3. Environment and facilities support productive and effective teamwork.
4. Roles and responsibilities are clear.

# Seven Keys Assessment

**Purpose:** Practice reviewing the health of the project using the Seven Keys

**Process:** See the diagram.

- Record status
- Think about issues & actions

**Participation:** Teams led by Project Manager

**Product:** Status, issues, and actions for the Team is High Performing key.

Time allowed 5 Minutes

## Seven Keys Assessment Worksheet

- Red - Urgent - Corrective action required immediately.
- Yellow - Warning - corrective action required in the near term.
- Green - Stay the Course - no corrective action required.

Project Name: \_\_\_\_\_ Interviewee: \_\_\_\_\_ Date: \_\_\_\_\_ Interviewer: \_\_\_\_\_

Key and Criteria	Noted Issues	Heads Up Display	Proposed Actions
Stakeholders are Committed	➤	Red Yellow Green	➤
Business Benefits are Being Realized	➤	Red Yellow Green	➤
Work and Schedule are Predictable	➤	Red Yellow Green	➤
Scope is Realistic and Managed	➤	Red Yellow Green	➤
Team is High Performing	➤	Red Yellow Green	➤
Risks are Being Mitigated	➤	Red Yellow Green	➤
Delivery Organization Benefits are Being Realized	➤	Red Yellow Green	➤

# PM Feedback

## After the case study exercise:

- The PM describes what went well
  - The team describes what went well
  - The PM describes what could have been better
  - The team describes what could have been better
  - Hand the feedback forms to the PM
- 
- After providing the PM feedback. Document your lessons learned on page 18 of the Learning Log.
    - This should include any changes that you plan to make in your daily work as a result of this exercise.

