Leading Teams

Ten Top Tips

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Most of us reading this magazine have probably been members or leaders of a technical or programmatic review team. These teams have names like "red team," "independent review team," "tiger team," or "assessment team"; and they are made up of a group of professional people chosen for their specific skill in reviewing or assessing a program, process, or function and reporting out their findings. As a team member, you may have found yourself thinking that the team could have been more effective if the leader had, perhaps, carried out his or her duties differently. If you were the leader, possibly you weren't sure how to proceed at certain times or when issues arose.

This article provides—not necessarily in chronological order—the Top Ten actions that a good team leader should take to make his or her team more efficient and productive.

1. Write a Charter

Defining your team's charter is perhaps the most important action you can take to ensure success and customer satisfaction. The customer may ask you to put together a team to "see what's wrong with the program," or "figure out why the software doesn't work." (Note that "customer," as used here, simply means the person or people asking for the assistance of the proposed team.) Sit with your customer to understand why he, she, or they think a team is needed and what they expect the team will produce. It is then up to you to write a simple charter defining precisely what you think the team will and will not do. If possible, use the customer's words for the first draft. Keep the charter short enough that it will fit on a bulleted chart or into a few sentences. Get the customer's agreement on the charter, iterating as necessary. At the same time, get agreement with the customer on a rough schedule for the work. This is a critical first step in meeting (and managing) the customer's expectations. Use your experience and common sense here to know if the schedule and charter are compatible. However (see "8. Consult"), you may want to get advice from others as to how much work your team can do in a specific amount of time.

As the team's work progresses, it may be nec-

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essary to rescope and recharter. If this happens, make sure the reasons are documented clearly and the customer is in agreement with the new charter. Always begin each briefing or report with the team charter so that the audience knows what the team was expected to do.

2. Choose Your Team

In many cases, you as the leader are expected to put together a team. Before picking up the phone, make sure you understand the resources you have. Are the members paid for by the customer asking for the team, or are they supposed to charge their own organizations for their time? Will the customer pull strings to get the people you need, or are you left on your own to convince them to assist you? In any case, always ask for the absolute best people you can think of, with the skills you need. Good people are always busy people; however, they can often choose the work they want to do, so it never hurts to ask. Along with the charter, you should have a draft plan and schedule to discuss with them and an idea of the minimum commitment needed to perform effectively on the team. For example, you might ask for one day a week for two months plus one out-of-town trip in the middle of the third month. Make sure you look the prospective member in the eye when he or she promises to commit that amount of time. It is a good idea to send a follow-up e-mail or memo to document your conversation and the commitment—and copy your management, the team member's management, and possibly even the customer.

You may be given a ready-made team. If so, get to know each member individually by scheduling a one-on-one conversation. Try to obtain up-to-date résumés to understand members' professional backgrounds. Solicit their assistance in making the team successful, even if they are unwilling participants, and assure them you will be an efficient leader so as to make the best use of their time. Again, explain the necessary time commitment, and document it as described above.

3. Assume Leadership

No matter if the team is one you've chosen or not, you are the team leader. This means you must lead, even if your team members are more senior, more skilled, or higher up on the organization chart. Teams cannot be led by committees. Kick off your team with an interactive meeting in which you set the tone—making sure that no one dominates (including you) and that everyone participates. Depending on your resources and the nature of the team, it may be advantageous to use a skilled facilitator for this first meeting. Make sure you adhere to good meeting practices: have an agenda, take minutes, note action items and those responsible for them, and so on. As the leader, you must be merciless about members' meeting their commitments (such as attending meetings, reading documents, preparing reports, etc.). If issues do occur, discuss the difficulty in private with the member, with the member's supervisor, or even with the customer. Remove members from the team if they repeatedly fail to meet commitments. It is not fair to participating members to make them carry an unproductive coworker.

4. Plan

A good team leader is always planning and replanning. Begin by deciding on your final product. Is it a report, a briefing, a spreadsheet? Bullet charts with appended notes are easily produced and more easily absorbed by busy customers than a long report. It can be very helpful to draft a final outbrief on the first day of the team's work, possibly even at the kickoff meeting if the schedule is short. This immediately sets the tone of what the team must produce and what is outside the scope of the team's work. It also provides for work assignments for each team member and reinforces the need to produce a tangible product.

As the leader, you must understand and track your budget, including travel. If it is not sufficient to meet the charter, you must rescope or find more money as soon as possible. Be sure, from the outset, that all team members

You're the Judge

In this column, we feature cases that center on an ethical dilemma and invite you to be the judge. Some of the cases involve agencies outside DoD, but the issues they present are equally applicable to the defense acquisition community.

Joe G. is an acquisition official working in DoD. He and his neighbor Jim M. are good friends and have been golfing buddies for 20-plus years, playing on an almost weekly basis. Jim M. retired from the military about eight years ago and now works for a defense contractor. Joe and Jim both hold senior positions in their respective organizations. As has been the custom since they first started golfing, they end each round of golf on the 19th hole, where they alternate buying each other drinks and appetizers.

For the last couple of years, Jim's boss, Bill B., has joined Joe and Jim about four times a year. Bill is not much of a golfer and always makes amends for his poor game by picking up the entire tab at the 19th hole. The amount depends on the course where they are playing, but it generally runs about $15. However, on one outing, Bill got a hole in one, and his wild celebration that day ran over $40.

You're the judge:
In accepting hospitality from Jim and Bill, does Joe have a Standards of Conduct problem?

understand the entire budget and their allotted portion (see "5. Communicate").

Of course, you must also plan—and possibly replan—your schedule. Make a determined effort to stick to the original schedule (remember, be merciless about commitment). No one—not the customer, not the team members, not you—will be happy about a schedule that keeps slipping. If a schedule slip seems imminent, consider descoping or deferring the additional work to a new team or to a subsequent review. For example, if a technical review begins finding cost irregularities, stick to the technical review and set up a separate cost review team or postpone the cost review until after the technical review is complete. Any out-of-scope effort your team thinks is needed should be recommended in the outbrief. Work with the team and the customer to determine if partial

results delivered on time are better than a more complete product delivered too late to have an impact.

5. Communicate
Communicating constantly may be the most important of all the leader's activities. Make sure each team member has access to every shred of information you create or receive. No team member should be able to say, "But you never told me ... ." Set up lists for voicemail, e-mail, and documents. Use delivery confirmation to ensure the e-mails arrived at their destination. Encourage members to copy their inputs to the entire team, and if they don't, *you* immediately forward them to each member. Have short but frequent status meetings with the team and with the customer. Invite the entire team to the team meetings, and be honest about current and potential difficulties. Ask the members their opinions, and consider what they say carefully, taking into account their different communication styles. Develop an ingrained habit of asking yourself, "Have I let everyone know what happened today?"

6. Lead
Okay, you're the leader—now lead. This is harder than it sounds, and there are many articles and books that discuss leadership. Don't be intimidated by team members more senior or more skilled than you or by insistent or aggressive members. A very important part of leadership is to work hard. Set an example of the dedication and high quality products you expect from the team. Figure out a vision and methodology, discuss it with each member individually, then help the team modify it as needed. A leader must make decisions. If you are communicating regularly with the team, they will understand why you made a decision even though they may not agree with it. Make sure you take charge of meetings and that everyone's voice is heard.

The customer will expect you, as the leader, to consult regularly one-on-one with him or her. Do be sure to pass along the insights you acquire from this meeting to the rest of the team. Trust your judgment, experience, and common sense. Keep moving forward. Mistakes are inevitable, but a good team will overcome them.

7. Delegate
Delegating increases your productivity and leverages your resources. Don't do the work of the team members. They are responsible for meeting their commitments, and if you are doing your job of planning, leading, and communicating, they will do theirs. However, *do* do sanity checks. Make sure interim products are of the expected quality and are delivered on time. Ask the specialists questions to make sure they did their homework. If they are convinced their investigation or analysis is correct, accept their inputs even if you disagree with them (but see the "feel right" warning under "8. Consult"). On a team

of professionals, peer pressure will almost always ensure accurate results from an individual. If a member really doesn't perform, you may need to rescope or even replace him/her, always in coordination with the customer. Try to complete the team's remaining tasks on schedule, even if subsequent work is needed to fill in what the non-performing member didn't complete.

8. Consult

Discuss your plans and progress with your customer, your boss, your coworkers, and with others who have led teams. If your team encounters a difficulty, look for advice and possible solutions. You will get better advice if you communicate the difficulty precisely. Search for recent activities or studies that can be useful to your team. Don't reinvent the wheel. Listen carefully to all inputs, but don't feel obligated to implement any suggestions that don't feel right to you. Trust your instincts. Do be cautious about discussing preliminary results outside the team. It may be very difficult to communicate the final results if the earlier ones are found to be incorrect.

9. Work

Good leaders must work hard. Do whatever it takes. Read documents. Type. Go pick up carryout lunches. Sometimes you have to make the coffee before you can make an impact. Set the example of hard work for the team and you will be gratified at the results.

If at all possible, "blitz" the task. This means dedicating the team to the task for a specific length of time. A small investigation team can get an amazing amount of work accomplished in a week, especially if they draft the outbrief on Monday morning and schedule the outbrief presentation for Friday afternoon. And don't visit or check with their offices during the time the team is working.

Stick to your scheduled status meetings. Even on longer-duration teams, keep working on the outbrief. This will immediately tell you where your results are incomplete or where rescoping is needed.

10. Give Credit

All of us have had experiences where our hard work was not acknowledged or someone else got credit for it. Make sure your team members don't have that experience. Always remind the customer and all audiences who the team members are, verbally and in all written products. Say "we" and "our team." Team members who feel ownership will also feel responsibility, and everyone benefits. Say "thank you" a million times. Saying thank you for a small effort helps to guarantee that your request for a larger effort will be successful. At the end of the team's task, write formal, individual thank-you letters—not e-mails—with copies to appropriate higher-ups in the individual's management chain. Even if you felt the member could have done a better job, say thank you for what was done well. Negative feedback should be given verbally in almost all instances, unless it is a repeated offense.

... And *Everybody* Wins

Leading a team is a professional opportunity to learn, contribute, and advance your career. It expands your professional network and enhances your knowledge and experience base. If you carry out your leadership duties well, the team members will also experience some of these benefits and will have spent their time productively. You've helped to ensure that the team's results are on time and of high quality. Best of all, you'll have a delighted customer who is very satisfied with the team's work.