

Zurich Group Germany



Bonding a team

Using profiling to take performance to the next level

Teams, departments and organisations continually face crucial projects with tight deadlines. This is difficult enough but team issues can make on-time delivery look impossible:

- Newly-formed teams - sometimes a team forms specifically to do a project. This can be made even more difficult if the team crosses organisational boundaries or is multi-national and has to cope with cultural issues.
- Technical teams - where the project is very technical the whole issue of team development may be ignored.

These situations are typically when instruments like the Margerison-McCann Team Management Profile are used: to gel a new team and ensure they work quickly.

Peter Wollmann, Head of Strategic Development at Zurich Group Germany, faced an urgent technical project but with an existing team. He comments, "If you've got a high performing team, that's exactly the point where a team event can pay dividends because the members trust each other and will take feedback. The result is that they move on to the next level."

Peter describes the process, provided by Bob Dignen, a director of York Associates and a trained user of the Margerison-McCann Team Management Systems Profiles, as: "one of the most valuable experiences in my 6-7 years as a leader." Bob and Peter offer valuable insights for anyone using the Margerison-McCann Types of Work Model, Team Management Profile and Linking Skills Profile.

The background

Zurich is an insurance-based financial services provider with 55,000 employees in over 120 companies. In 2008 their net income was \$US 3 billion.

Peter Wollman's need to develop a high-functioning project team stems from recently introduced US legislation. "The business scandals at Enron and WorldCom mean that all publicly-traded companies in the USA must submit an annual report on their internal accounting controls to the Securities and Exchange Commission. Our US company had to meet the requirements of Sarbanes-Oxley 2002, the act that makes these demands. But Zurich wanted all its national companies to submit voluntarily to the discipline."

Peter was tasked with setting up a team to look at every major business process and control point within the company. "There were respectively 110 and 3000 of these. We had to document them, analyse the risks, and improve them if they needed it. We formed a team of around 50 people with a core team of five: me, two internal managers and two external Ernst & Young Consultants. We had six months to complete the task. Once it was finished the processes and controls would continue to be reviewed every six months.

My first instinct was that we had to ensure the core team worked. The team members were split between internal staff and external consultants: we were working across organisational lines.

Over the months the team proved itself able to deliver excellent results under a lot of pressure."

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Using profiling with a mature team

Peter was familiar with the Team Management Systems profiling instruments, having worked with Bob Dignen at York Associates. He saw the potential such instruments offered to run an event with a mature team which would affirm trust in individuals' abilities.

"These were mature managers with mutual trust. We could share individual Profiles openly within the group, adding a genuine 360-degree element to the process."

The process proved so successful that a three part process was eventually conceived, each one built round a different Team Management Systems Profile, over two sessions."

Phase 1 - Finding the gaps

"We mapped the key tasks for the core team on the Types of Work Model to see where we had gaps."

Mapping tasks onto the Types of Work Model



Margerison-McCann
Types of Work Model

The process Peter introduced was:

1. Create a list of the team's key tasks
2. The group identifies three segments from the Types of Work Model that are needed to complete each task
3. Score each of these segments from 3 for the most important to 1 for the least important.
4. Total the scores for each segment.

The scores reflected the team's ideas of what the project needed and it highlighted where they were underestimating the need for specific types of work.

Peter comments, "we understood that segments like Organising and Producing were important but we underestimated segments such as Advising and Promoting. This is often the case with technical or professional companies. We discussed this and created

specific task lists for team members to strengthen our activities in areas we were underestimating. The exercise helped us cover all the bases."

Phase 2 - Helping the team to understand each other's ways of working

The second phase used the Team Management Profile. "Individuals filled it in and we then carried out one-to-one feedback sessions followed by group discussions of individual Profiles" says Bob.

He felt the group was particularly open to feedback and has theories about the reasons. "The feedback was in English which was their second language. The members were thinking hard about the words' meanings, which meant they had less time to get nervous about sharing Profiles. Words carried less emotional baggage."

Peter comments that the process has opened the group up to personal feedback more generally. "Having been through it once they're used to the experience. Each person was able to have a 'conversation with themselves' about personal preference issues. They'll be better managers because of this."

Outcomes included action points for the members of the team, not only about their own individual preferences but about the relational aspects of the team: "how they should treat each other to get the best work."

Phase 3 - Aligning the team with the organisation

A month later, the group repeated the exercise with the Linking Skills Profile.

"This linked to my central area of interest: the cultural aspects of communication," says Bob. "The delegates filled in the Profile Questionnaire. They asked questions about the precise meaning of specific items in the Questionnaire so our first session looked at four of these."

- Question 1: Listening when others are speaking
- Question 25: Communicates persuasively when speaking
- Question 26: Asks questions rather than makes statements
- Question 49: Communicates group discussions well

“The Participants will never forget their experience ... so the benefits to the company go way beyond the completion of a very important project.”

“We discussed precisely what these statements meant in the contexts of our group, of the company, and of a particular country. We also looked more generally at communication: how misunderstandings occur; how to make communication clearer and how to listen actively to what is being meant, not just what is being said.



The Margerison-McCann Linking Skills Model

“In other words, the Linking Skills Profile was a goldmine of discussion topics about team issues. After this session we held a 360-degree exercise using flipcharts. We put up the results from each questions: delegates commented on the flipcharts and then everyone made comments.

“The result was a set of contextualised team behaviours: not general ones, but behaviours that made sense in the very specific context of that project.”

The outcomes

“We produced 110 large pieces of documentation. In other words we achieved what we set out to do,” says Peter. “But that’s the technical outcome. **The human outcomes are just as important. The participants will never forget their experience. They’ll keep in touch and will create an informal network both within and outside the company. The Team Management Systems framework has given them a vocabulary to discuss development and human issues at work. So the benefits to the company go way beyond the completion of a very important project.**”

Will Peter use the Profiling tools again? “Certainly. I’m already thinking about how they can be incorporated in upcoming projects.”

Tips from the project

- Even the most technical initiative has a human development aspect. Any change is as much about thought, attitude and culture as it is about process.
- Any company internationalising **MUST** have a project leader committed to people development to overcome cultural differences and build high-performing teams.
- Feedback in a foreign language is more neutral so can reduce defensiveness, whilst the Team Management Profile’s simple language and transparent concepts facilitate understanding.
- Use of the Team Management Systems approach creates a shared experience which lasts long beyond a particular project, creating useful informal networks within a company.
- The techniques are often used to ‘mend’ broken teams or put together new ones. But, as Zurich discovered, they can also be used to confirm to a team that it is working well and energise it to take forward a project.
- Trust is crucial in sharing individual profiles.
- The three stages - using the Types of Work Model, Team Management Profile and Linking Skills Profile - can be used as a continuum to develop the team.
- The Linking Skills Profile Questionnaire items can be used as invaluable discussion topics around cultural differences, communication issues and the precise requirements of a particular organisation.
- Feedback covers not only how an individual prefers to work but also how the rest of the team needs to treat that person to get the best out of them.

Further information:
www.york-associates.co.uk
www.zurich.com
www.tmsdi.com