

Check and balance



The L&D team in a big audit firm used the Team Management Profile to help create a culture of openness and trust in an organisation that used to believe that allowing independent thought posed risks to its reputation.

You might assume a certain type of person would be attracted to, and enjoy working in, an audit environment: auditors tend to be significantly more risk-averse, rigorous and analytical than colleagues in some other professions. So Jackie Wilder, head of learning and development (L&D) at a large audit firm, wasn't surprised to find 75% of her organisation's 850 audit staff bunched between what she describes as "3 o'clock and 6 o'clock" on the Team Management Wheel. Some 30% were Concluder-Producers, 22% Thruster-Organisers, 12% Assessor-Developers and 11% Controller-Inspectors, while just 2% were Upholder-Maintainers and 3% Reporter-Advisers.

But this uneven distribution of work preferences was causing problems in the

firm – notably a lack of trust and an apparent inability to have adult' conversations about 'difficult' issues. The organisation was in the dark about just why the culture was so unhelpful until accredited facilitators Jackie and her L&D colleague Peter Fry used the Team Management Profile.

Jackie starts from the beginning. "Our senior leader appointed several new members to the leadership team, and we deliberately went for 'outsiders' who could bring in new expertise and objectivity," she explains. "They told us they were surprised we weren't a more collaborative organisation, that people seemed to be trying to solve problems on their own and that, as such, we weren't leveraging the true value of our people."

When Jackie and Peter dug beneath the surface, they uncovered a lack of understanding among some of the more senior managers that there's more than one way to achieve a good result. As a consequence, micro-management was endemic. "Some team members felt like fish out of water because their way was so different from most other people's, and this was often very stressful for them," says Jackie. "The people who found it most difficult were those being managed by people who, it subsequently turned out, were their polar opposites on the Team Management Wheel."

Once she and Peter had got everyone to complete the Team Management Profile Questionnaire and analysed the results, they won the backing of the leadership



team to develop a series of workshops for all employees to help them, as she says, “understand their preferences, learn how to step out of them and recognise the kind of behaviours from others that wind them up.” These workshops were built into a two-year programme which began in the summer of 2016.

Before that, the pair did some one-to-one performance coaching for people who fell into the minority groupings around the Team Management Wheel and hadn’t been able to understand quite why they couldn’t seem to do anything right in their bosses’ eyes.

“It was really lovely,” recalls Peter. “I would start every coaching session, where there had been conflict between an individual and their manager, by saying ‘let’s look at your Profile and see if we can identify why you’re getting this feedback’. And very often we would find it right there, in their Profile, almost word for word. For example, ‘you work very hard but you don’t communicate what you’re doing’ – which points to a clear area for development. Seeing it in black and white, in a Profile that they’ve ‘bought into’, feels a lot less personal to the individual than receiving ‘negative’ feedback from their boss. As a result, they’re much more receptive to addressing it.”

The ‘saddest’ conversations Peter’s had are those with Creator-Innovators (11% of the organisation’s workforce). “They’re very flexible and adaptable, but very last-minute. And because, in an audit environment, everything needs to be organised and nailed down in plenty of time, their line managers don’t trust them and relationships break down. What’s more, leaving everything to the last minute means they’re putting too much pressure on themselves given the job they have to do.

Round pegs in square holes?

This kind of coaching, combined with the greater understanding among managers that different work preferences aren’t necessarily ‘wrong’, can help people in the minority segments of the Team Management Wheel

to work more effectively in their teams. For others, however, it may lead to a different perspective on their future career journey.

Trainee Angus Lord, for example, is thinking about his options. He is one of the Reporter-Advisers who comprise just 3% of the employee base. He joined the firm five years ago, aged 20, and has just completed his exams. He was planning to move to another audit firm in the north of England, where he’s currently based, but since doing the programme and associated coaching he’s been reflecting on whether audit is actually the career for him.

“I’d found it difficult working with different people, but I hadn’t put it down to anything in particular,” he recalls. “But once I saw my Profile, and of her people’s, it brought everything to life. My summary report really resonated with me, and I could also see that the level of detail I put into a piece of work, and my overall approach, were very different from those of the people I was working with.”

“ We used the Team Management Profile to break the communications impasse ”

He found the programme helpful but feels that he has tried to adapt to others’ preferences more than they have adapted to his. “The theory is great, but when it comes to the crunch, the nature of what we have to do – meet hard deadlines, for instance – means I’m having to push myself into uncomfortable territory more than I want to. I spend a large part of my working year in situations that are not my preference.”

Angus enjoys aspects of the job – particularly communication with his team and his clients – but is less keen on spreadsheets and reports, rigidity and compliance – noting ruefully that the latter represent “a large part of what we do.”

Some people, however, have managed to

adapt their role to their work preferences. Jackie herself, an auditor by training, is a Creator-Innovator / Explorer-Promoter and relishes her L&D role because it allows her to play to her strengths. But she does audit work too, and while she ‘hates’ spreadsheets, she mitigates the discomfort by working on them at home, aided by music and lots of different-coloured pens.

One of the reasons Peter and Jackie found the Team Management Profile so appealing was that, unlike other psychometric tools, which tend to put people in ‘boxes’ or attach ‘labels’ to them, the Team Management Profile is about preferences. Peter explains: “Labels stick and can be restrictive. We don’t want people to say they can’t do something because that’s not their preference. We all have to do everything.”

Within the organisation people tend to use the language of the four Work Preference Measures (Extrovert-Introvert, Practical-Creative, Analytical-Beliefs and Structured-Flexible), rather than the language of the Team Management Wheel – probably because they find them more helpful in understanding people’s approach to their work.

While Jackie wasn’t surprised by the organisation’s distribution round the Wheel, she was taken aback by just how many people scored very highly on both the Analytical and Structured scales and, conversely, how few people “even dipped a toe” into the Beliefs side of the scale.

Peter thinks this reflects the overt work orientation of the Team Management Profile. “Because the questions are framed in a work context, the answers are inevitably going to be skewed towards how people behave in their job. People may be very different with family and friends than they are with work colleagues or clients, for example.

His observation speaks to the need for a balance of people in a team – and there are signs that the organisation is starting to change.



Audit manager Charlie Taylor says that despite being a dyed-in-the-wool auditor in a firm where people tend to recruit in their own image, he recently appointed a new member to his team who broke the traditional audit mould.

Charlie continues: "We are certainly more people focused these days: we think person first, task second, and it's then about working out how best to support the individual to deliver the task to the best of their ability. That makes for a happier team, which is a huge benefit to the way we work."

Gaining buy-in

Interestingly, the scepticism, even cynicism, that defines a good auditor was less of a barrier to embracing the Team Management Profile than Jackie and Peter had anticipated. "Our people prefer clarity and frameworks to 'feelings', and the nature of the Team Management Profile tools and exercises gave them a reference point to have conversations about working styles and approaches that were previously uncomfortable for them," says Jackie. "We did have to win over some cynics though – through a mixture of coaching, cajoling, additional exercises, and sometimes telling them that they had no choice 'because it's important to the way you do your job'."

And the way they communicated the programme to the organisation was critical too, adds Peter. "We sold it as a conversation starter or a tool that can be used to foster more productive working relationships.

And Jackie and Peter have found that young recruits (the firm hires many new graduates every year) are particularly keen on the Team Management Profile. "They are hungry for learning and find the Profiles a fascinating insight," says Peter, and their enthusiasm is infectious. However, they've learned that letting graduates get three months' work experience under their belt before completing their Profile Questionnaire is more effective than getting them to do it as soon as they join.

Peter explains: "In 2018, we led a full day programme on the Team Management Profile for new graduates, but we found that they were responding as though it was a job interview – putting the answers that they thought we wanted them to put. But, of course, it is not about being 'right' or 'wrong'. What's more, they lacked work experience. So in 2019 we gave new graduates a taster so that they could understand the language used by the teams they were going to be working with, but we waited to do their Profiles and workshops."



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This was just one of the lessons that the L&D team itself has learned in starting to use the Team Management Profile. Jackie explains: "With each workshop session, we became increasingly aware that we had to play to people's learning preferences. After all, the whole point of the Team Management Profile is about understanding and embracing difference in order to get the best out of each other. We in L&D tend to be green and yellow, Extrovert and Creative, but we realised that delivering training in the way that comes naturally to us put some people off completely. For example, the exercise where we get people to stand in a line according to where they come on the Extrovert-Introvert scale is really powerful – but some people had such a strong Introvert preference that they didn't even want to stand in the line.

"The team focused closely on Introvert characteristics, given that some 55% of employees fell into that category. For example, they looked at how to run meetings to get the most out of people with a more Introvert preference – including how to draw them into the conversation and, where necessary, letting the silence settle rather

than those with a more Extrovert preference filling it with words. But Jackie and Peter realised that certain messages were starting to permeate the organisation – such as 'we don't like introverts, just extroverts' – which, as Jackie says, "is just plain wrong." Another misconception they picked up was that people with a more Extrovert preference have to learn how to work on their own': "What we had to get people to understand was that people with a more Extrovert preference can work on their own but will also welcome opportunities for interaction.

She thinks the 'misinformation' was the result of too many people delivering the course in the early days, something that "threatened the cohesiveness and lesson learning." She and Peter soon realised that they needed to deliver most of the training themselves, but they used the other six members of the L&D team that TMSDI had accredited to act as 'champions', observers and documenters.

The times they are a-changin'

It's not difficult to see why the culture at the organisation had become unhelpful. Auditors need to be absolutely certain of their ground and sure about the facts. Their reputation – and that of their employers – depends on it. "Trust had broken down here because people were afraid that if they let others think independently they might make the wrong decisions, and that was a massive risk to our reputation," says Peter.

But things are changing. The programme has fostered more honest conversations and greater understanding that complementary approaches within a team can be beneficial.

"Immediately people could see how using the Team Management Systems language could make potentially 'difficult' conversations less personal and clumsy," says Jackie. "Being able to point to different parts of the Wheel in the workshops and say 'well, I'm a yellow and you're a pink, and I feel you micro-manage me and that makes my hackles rise' was very liberating for people, and allowed them to

work out how they could meet in the middle. For example, when they're sitting doing audits, some people prefer to work in silence, while some like to chat. Now, rather than each side feeling irritated by the other, they think 'how can we as a group work better', with an individual able to say 'I'm finding it a bit noisy – is it ok for me to move somewhere else to work?'

Overall, she concludes: "The programme has given licence to people to talk and work in different ways."

Charlie Taylor concurs: "I now understand that a certain team member hates to feel 'checked-up on' and I can let them do certain things in the way they prefer. But they have to understand that I absolutely need certain things from them – for example, I explained to them that I turn into a bag of nerves if they disappear for a while. But we can have those kinds of conversations now and it makes working relationships much more effective."

Felix Rosenbaum is a Creator-Innovator – a minority group in the firm. "When I read my Profile summary I was impressed because it was me, but it also made me aware of things about myself I'd not been fully conscious of. The recommendations about how I might work more effectively with people with different work preferences was really useful. I like getting involved in the detail of something and researching it, and taking time to form an opinion rather than making a snap judgement. It's been really helpful to explain that to people who typically expect an instant answer. But I've also been able to capitalise on others' strengths: for example, I am

'observant of deadlines', but need someone else to help me enforce those deadlines. I now proactively ask for help to prioritise my work and plan ahead."

Peter points out that it's not about either the manager or their team member having to conform, "but rather about both sides stretching themselves to accommodate the other and finding a compromise in the way they work."

The beauty of using the Work Preference Measures as well as the Team Management Wheel is that the scales can cut across the colours. So while people may be on opposite sides of the Wheel, they could both have a more Extrovert preference, for example. "They may have more in common than their role on the Team Management Wheel might suggest," says Peter. "One of the 'aha' moments comes when we point that out to them."

“ we now talk to each other rather than at each other ”

Charlie Taylor recalls: "When we did the exercises, like standing in a line along the scales or grouping ourselves around the Wheel, it was fascinating to see where we all fell. I realised what a cognitively diverse bunch we actually were. It was about revealing what we're really like behind the corporate mask that we present."

There has been a significant culture shift at the firm since the programme began in summer

2016. Charlie says: "A colleague came back to work recently after a long time away and she commented on how much friendlier and flexible and less hierarchical the organisation is now. She said we now talk to each other rather than at each other."

Sustaining the change

The challenge now is how to sustain the change. One of the characteristics of the organisation is the speed with which audit teams form and disband – typically every nine months. An advantage of this is that "positive stuff gets spread around and negative stuff diluted," says Jackie. A disadvantage is that in what Felix Rosenbaum describes as "organised chaos" people revert to type and their default characteristics re-emerge. "Organisations need to continually draw on and promote the Team Management Profile thinking," he says.

But there is general agreement that the Team Management Profile language is becoming more embedded: "We're looking at how to embed it into other training courses like 'How to run audit interviews'," says Jackie. They're also looking at how to build the Team Management Profile into the firm's twice-yearly performance appraisal conversations. "We're also encouraged by the number of requests we get to run revision sessions."

Crucially, there is a will to make it work: "Lots of people found it a relief to be able to talk about this stuff," says Jackie. And the 86% of participants who rated the course 'good' and above – an unusually high score for a mandatory course at this firm – speaks for itself.