

TEAM: PROJECT TEAM ENVIRONMENTAL ANALYSIS

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Building on the work done by Robert Simons in *Designing High-Performance Jobs*, TEAM is a coaching tool that can be used when working with a client who wishes to assess and potentially redesign his or her project team.

Strategies for Project Team Planning

Four aligned environmental elements are needed for a Project Team to be successful. Two of these elements (Authority and Triangulation) relate to the supplies (resources) needed for members of the Project Team to be able to effectively initiate the project. The other two elements (Expectations and Motivation) relate to the demands being made on the Project Team from outside the team. Members of the Project Team have substantial control (internal locus of control) with regard to two of the four environmental elements (Authority and Motivation), but have very little direct control (external locus of control) with regard to the other two environmental elements (Expectations and Triangulation).

Authority [Internal Locus of Control] [Supply Element]

A project is more likely to be successful if it gains access to substantial resources in the organization (though increased expectations often come with more substantial resources).

Control (Formal Authority): The resources which Project Team “owns” or has been officially assigned to and provided for this project.

Patronage (Informal Authority): The resources to which Project Team has

access that are officially “owned” by or assigned to others in the organization that has been loaned to this project team (yet can be withdrawn).

Defines the range of resources – not only people but also assets and infrastructure – for which a team is given decision rights. The team is held accountable for performance resulting from deployment of these resources.

To Decrease the Authority: Reduce resources allocated to specific positions or units

To Increase the Authority: Allocate more people, assets, and infrastructure

Expectations [External Locus of Control] [Demand Element]

A project team is more challenged if the expectations of others in the organization are higher (though higher expectations often come with greater authority over and access to organizational resources).

Accountability (Formal Expectations): The designated and assigned outcomes for the Project Team

Hope (Informal Expectations): The often unacknowledged, but shared, expectations regarding Project Team outcomes – if highly successful

The range of trade-offs affecting the measures used to evaluate a team’s achievements. The strength of this environmental element is determined by the kind of actions and outcomes that are formally and informally expected of this project team.

The expectation element and authority element are not independent. They must be considered together. The first element (Expectations) defines the end points for a project team and the second element (Authority) defines the resources that are available to a team as it moves toward these end points. By explicitly setting the expectations for a project team higher than the authority formally and informally granted to the team, an organization can force a project team to become more entrepreneurial.

To Raise the Expectations: Standardize work by using measures (either financial, such as time-item budget expenses, or non-financial, such as head count) that allow few tradeoffs.

To Lower the Expectations: Use non-financial measures (such as customer satisfaction) or broad financial measures (such as profits) that allow many tradeoffs.

Motivation [Internal Locus of Control] [Demand Element]

A project is likely to gain much more support in an organization (yet also increase expectations) if it holds the potential of influencing other projects and encouraging other people in the organization.

Enablement (Tangible Motivation): The direct ways in which Project Team can benefit others in the organization and, more specifically, contribute to the success of other projects.

Encouragement (Intangible Motivation): The indirect ways in which Project Team can be champion or ever-present “colleague” to others in the organization and, more specifically, to other projects.

The importance of the motivational element in a project team's environment is determined in part by the width of the net that a team needs to cast in collecting data, probing for new information, and attempting to influence the work of others. Leaders of an organization can increase the importance of the motivational element by redesigning the task assigned to this project team – placing the team on a cross-functional relationship with other project teams or giving the team an assignment that requires it to report to two bosses. These leaders can decrease the motivational properties of a project team by encouraging members of the project teams to think outside the box (and outside the organization) in developing new ways of serving customers, increasing internal efficiencies, or adapting to changes in external markets. Project team members, in other words, are encouraged to serve as pioneers who are working well beyond (and therefore isolated from) anyone else in the organization.

Leaders can also adjust motivational levels for a project team by adjusting the goals they set for this team. Although the nature of a team's goals drives the expectations element (by determining the trade-offs team members can make), the level or difficulty of meeting these expectations, drives the team's motivational level. A project team that is given a stretch goal will often be forced to seek out and interact with more people and other teams than a team or person whose goal is set at a much lower level (increasing the need for high levels of both motivation and triangulation). Finally, organizational leaders can use accounting and control systems to adjust the motivational level (e.g. assigning indirect cost allocations to team).

To Lower Motivational Levels: Require people to pay attention only to their own jobs; do not allocate costs across units; use single reporting lines; and reward individual performance.

To Increase Motivational Levels: Inject creative tension through structures, systems, and goals – for example, cross-unit teams, dotted lines, matrix structures, stretch goals, cross-unit cost allocation, and transfer prices.

Triangulation [External Locus of Control] [Supply Element]

True and enduring support in an organization comes not just from connecting with and receiving tangible or intangible support from other people, another project, another initiative or another agency in the organization. It comes from a triangulation wherein both your team and the other entity link positively with a third entity (a shared mission, a shared vision, a shared commitment to and capacity to enable a more general and critical project in the organization). A triangulated structure is always stronger (able to withstand powerful external forces) than a structure with only two anchor points (or two sets of anchor points: a four-sided structure).

Investment (Tangible Triangulation): The unwavering, specific and voluntary contributions of resources from elsewhere in the organization to the Project Team as a result of shared commitment to specific organizational values, vision and purposes.

Good Will (Intangible Triangulation): The sustained and honest best wishes of others in the organization for the success of this project and for successful engagement of Project Team members in this project based on shared commitment to specific organizational values, vision and purposes.

The level of triangulation determines the amount of help a project team can expect from teams and individual people in other organizational units. The required level of triangulation is, in turn, determined by the amount of commitment from various stakeholders the team requires in order to implement its strategies and meet the expectations assigned to this project team by the organizational environment. High levels of triangulation become critically important when customer loyalty is vital to strategy implementation or when organizational design is highly complex because of sophisticated technologies and a complex value chain. Teams cannot

adjust levels of triangulation in isolation. That's because the strength of this environmental element is largely determined by people's sense of shared responsibilities, which in turn stems from an organization's culture and values.

To Increase Level of Triangulation: Build shared responsibilities through purpose and mission, organization-wide identification, trust, and equity-based incentive plans.

To Reduce Level of Triangulation: Use leveraged, highly individualized rewards, and clearly single out winners and losers.

Analysis of Team Environment: Designing High Performance Project Teams

There are four elements within the environment of an organization that play an important role in determining the effectiveness of project teams. These four elements are: (1) expectations, (2) authority, (3) motivational and (4) triangulation. Each of these elements can be increased or decreased. An effectively-designed project team (when mapped out on a Project Team Environmental Analysis graph) is one where the line linking authority and triangulation cross the line that links expectations and motivation.

Project Team Design

When adjusting team design, the first step to be taken by the project team in association with leaders of the organization is to set the level of *Authority* to reflect the resources allocated to the team – especially if the team and its project plays an important role in delivering customer value. Next, the project team in association with leaders of the organization should set a specific level of entrepreneurial behavior and creative tension for the team by increasing or decreasing *Expectations* and *Motivation*. Finally, members of the project team in association with leaders of

the organization should adjust the level of *Triangulation* to ensure that the team will get the informal help it needs.

Two of the environmental elements measure the *supply* of resources the organization provides to project teams. The *Authority* element relates to the level of direct control a team has over people, assets, and information. The *Triangulation* element is its “softer” counterpart, reflecting the supply of resources in the contributions and good will offered by various stakeholders in the organization.

The other two elements – *Expectations* (hard) and *Motivation* (soft) – determine *demands* on the project team from various stakeholders in the organization. The level of expectations for a project team, as defined by the organization, directly affects the level of pressure on team members to make trade-offs; that pressure in turn drives the team’s need for organizational resources. The motivational level for a team, as determined by the structure of the team and the broader system in which the team is embedded, also reflects the extent to which team members have a legitimate right to request resources.

For any organization to operate at maximum efficiency and effectiveness, the supply of resources for each project team must equal the demand. In other words, *Authority* plus *Triangulation* must equal *Expectations* plus *Motivation*.

Using the Project Team Environmental Analysis Questionnaire and the Project Team Environmental Analysis Graph to determine levels of expectations, authority, motivation and triangulation, members of a project team can engage in a review of existing environmental levels and determine most appropriate environmental levels for efficiency and effectiveness.

Step One: Complete the Project Team Environmental Questionnaire, determining the levels for each of the four elements by assigning a rating (score from “1” to “5”) to each of the two sub-elements and adding together these two ratings (a total score from “2” to “10”).

Step Two: Place a mark on each of the four lines of the Project Team Environmental Analysis Graph, based on the team members’ assignment of ratings for each of the four environmental elements.

Step Three: Draw a line between the mark on the Authority line and the mark on the Triangulation line [forming the supply of resources line]. Draw a second line between the mark on the Expectation line and the mark on the Motivation line [forming the demand for resources line].

Step Four: If the two lines intersect, forming an “X,” then demand equals support (at least roughly) and the team is properly designed for sustained performance. If the lines do not cross, then the spans are misaligned. If resources (Authority plus Triangulation) are insufficient for the task at hand, strategy implementation will fail [ineffectiveness]. If resources are excessive, underutilization of assets and poor economic performance can be predicted [inefficiency].

A crisis of resources is most likely to occur when leaders who oversee project teams spend too much time thinking about authority, motivation and expectations, and not enough time thinking about triangulation.

A crisis of control is likely to occur in highly decentralized organizations where separate business units are created to be close to customers. Supply of resources (authority, plus triangulation) exceeds an organizational leader’s ability to

effectively monitor project team trade-offs (expectations) and to ensure coordination of knowledge sharing among teams (motivation).

A crisis of red tape can occur in any organization where powerful staff groups overseeing key internal processes, such as strategic planning and resource allocation, design performance management systems that are too complex for the organization. Levels of environmental expectations and motivation are very high, but resources are insufficient and misdirected. The demand for resources exceeds supply.

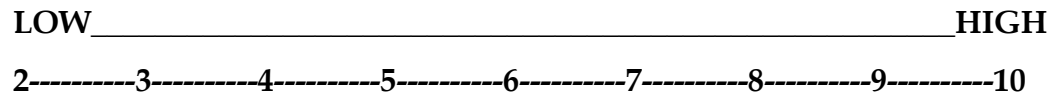
TEAM:
Project Team Environmental Analysis

Name of Project Team Being Analyzed:

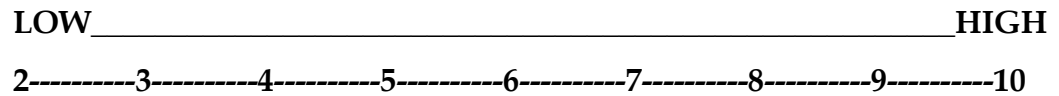
Brief Description of Project Being Analyzed:

ENVIRONMENTAL ANALYSIS

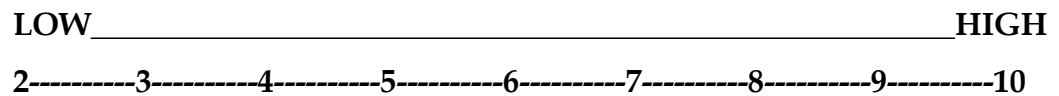
AUTHORITY



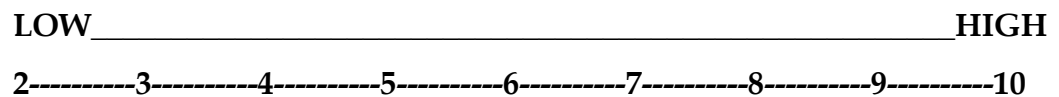
EXPECTATIONS



MOTIVATION



TRIANGULATION



TEAM:

Project Team Environmental Analysis
[Example A: Properly Aligned Project Team]

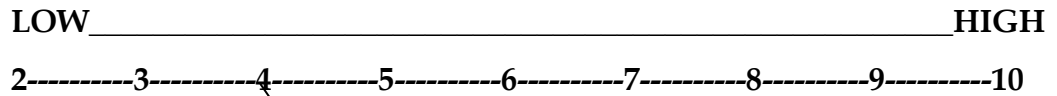
Name of Project Team Being Analyzed:

_____ Exemplar Project Team A _____

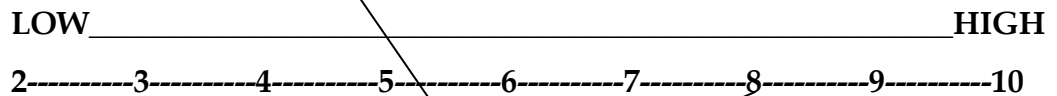
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ENVIRONMENTAL ANALYSIS

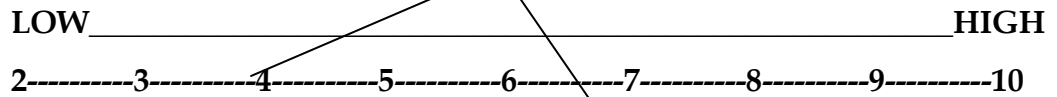
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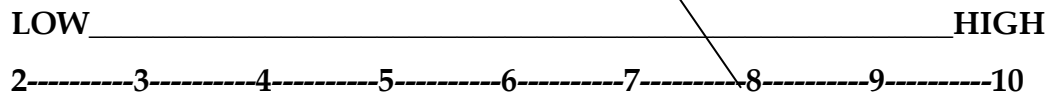
EXPECTATIONS



MOTIVATION



TRIANGULATION



TEAM:

Project Team Environmental Analysis

[Example B: Improperly Aligned Project Team]

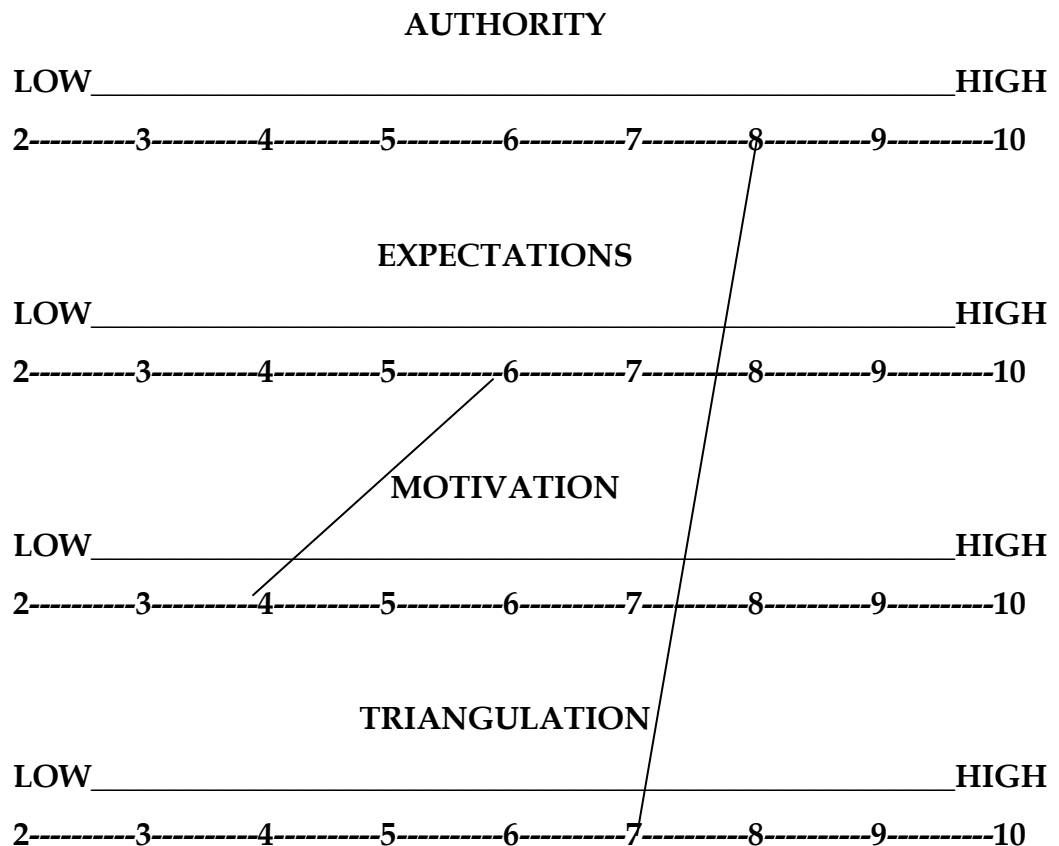
Name of Project Team Being Analyzed:

_____ Exemplar Project Team B _____

Brief Description of Project Being Analyzed:

_____ Under-utilization of Resources [Inefficiency] _____

ENVIRONMENTAL ANALYSIS



TEAM:

Project Team Environmental Analysis

[Example C: Improperly Aligned Project Team]

Name of Project Team Being Analyzed:

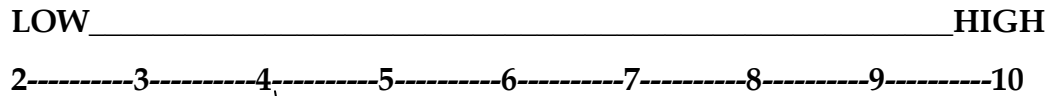
_____ Exemplar Project Team C _____

Brief Description of Project Being Analyzed:

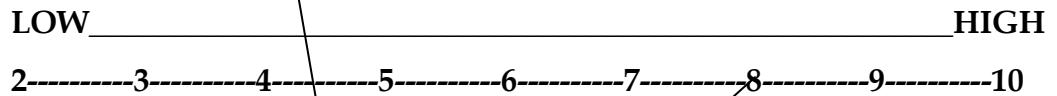
_____ Insufficient Resources [Ineffectiveness] _____

ENVIRONMENTAL ANALYSIS

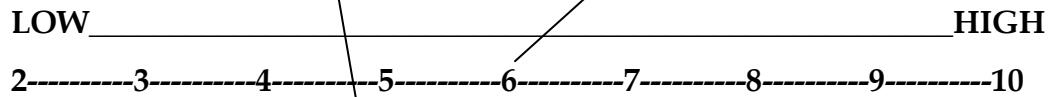
AUTHORITY



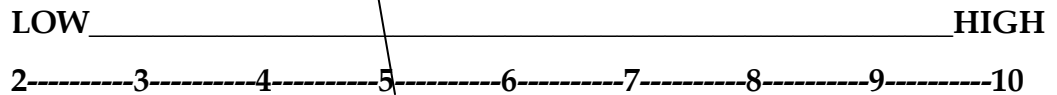
EXPECTATIONS



MOTIVATION



TRIANGULATION



TEAM

Strategies for Project Team Planning

Summary

Four aligned environmental elements are needed for a Project Team to be successful. Two of these elements (A and T) relate to the supplies (resources) needed for members of the Project Team to be able to effectively initiate the project. Two of the other elements (E and M) relate to the demands being made on the Project Team from outside the team. Members of the Project Team have substantial control (internal locus of control) with regard to two of the four elements (A and M), but have very little direct control (external locus of control) with regard to the other two elements (E and T).

Expectations [External Locus of Control] [Demand Element]

A project team is more challenged if the expectations of others in the organization are higher (though higher expectations often come with greater authority over and access to organizational resources).

Accountability (Formal Expectations): The designated and assigned outcomes for the Project Team

Hope (Informal Expectations): The often unacknowledged, but shared, expectations regarding Project Team outcomes—if highly successful

Authority [Internal Locus of Control] [Supply Element]

A project is more likely to be successful if it gains access to substantial resources in the organization (though with more substantial resources come increased expectations).

Control (Formal Authority): The resources which Project Team “owns” or has been officially assigned to and provided for this project.

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Motivation [Internal Locus of Control] [Demand Element]

A project is likely to gain much more support in an organization (yet also increase expectations) if it holds the potential of influencing other projects in the organization.

Enablement (Tangible Motivation): The direct ways in which Project Team can benefit others in the organization and, more specifically, contribute to the success of other projects.

Encouragement (Intangible Motivation): The indirect ways in which Project Team can be a champion or ever-present “colleague” to others in the organization and, more specifically, to other projects.

Triangulation [External Locus of Control] [Supply Element]

True and enduring support in an organization comes not just from connecting with and receiving tangible or intangible support from other people, another project, another initiative or another agency in the organization. It comes from a triangulation wherein both your team and the other entity link positively with a third entity (a shared mission, a shared vision, a shared commitment to and capacity to enable a more general and critical project in the organization). A triangulated structure is always stronger (able to withstand powerful external forces) than a structure with only two anchor points (or two sets of anchor points: a four-sided structure).

Investment (Tangible Triangulation): The unwavering and specific contributions of resources from elsewhere in the organization to the Project Team.

Good Will (Intangible Triangulation): The sustained and honest best wishes of others in the organization for the success of this project and for the successful engagement of Project Team members in this project.

EAQ:

Project Team Environmental Analysis Questionnaire

Complete this Project Team Environmental Analysis Questionnaire (EAQ) by determining the levels for each of the four environmental elements. Assign a rating (score from "1" to "5") to each of the two sub-elements and add together these two ratings (a total score from "2" to "10").

Authority [Internal Locus of Control] [Supply Element]

Authority Total Score: _____

Control (Formal Authority): The resources which Project Team "owns" or has been officially assigned to and provided for this project.

Control Score: _____

1 = No formal control: No consideration by any stakeholder group in this organization of extent to which this project team owns or has legitimate right to claim any resources in this organization.

2 = Low level of formal control: Some discussion about but no formal assignment of control to project team by any stakeholder group in this organization.

3 = Moderate level of formal control: Assignment of some formal control by at least one stakeholder group in this organization.

4 = High level of formal control: Assignment of extensive formal control to project team and broad based announcement of this control by at least one stakeholder group in organization.

5 = Very high level of formal control: Assignment of extensive formal control to this project team by multiple stakeholder groups in this organization, broad based announcement of this extensive control and wide-spread discussion about and agreement regarding the appropriateness of this control.

Patronage (Informal Authority): The resources to which Project Team has access that are officially “owned” by or assigned to others in the organization..

Patronage Score: _____

1 = *No informal patronage:* No expression or even apparent consideration of ways in which to support and donate resources to this project by any stakeholder group in this organization.

2 = *Low level of informal patronage:* Sporadic and isolated expression of desire to support and donate resources to this project by one or more stakeholder groups in this organization.

3 = *Moderate level of informal patronage:* Fairly widespread and public expression of desire to support and actual donation of resources or temporary allocation of resources to this project team by one or more stakeholder groups in organization.

4 = *High level of informal patronage:* Widespread donation of resources or long-term allocation of resources to this project team by many stakeholder groups in this organization.

5 = *Very high level of informal patronage:* Powerful and even over-whelming donation of resources or allocation of extensive resources for an indeterminate time (“as long as these resources are needed”) by many stakeholder groups in this organization.

Expectations [External Locus of Control] [Demand Element]

Expectations Total Score: _____

Accountability (Formal Expectations): The designated and assigned outcomes for the Project Team

Accountability Score: _____

1 = No formal accountability: No consideration by any stakeholder group in this organization regarding the accountability of this project team for specific project outcomes.

2 = Low level of formal accountability: Some discussion but no formal assignment of accountability by at least one stakeholder group in this organization.

3 = Moderate level of formal accountability: Assignment of some formal accountability by at least one stakeholder group in this organization.

4 = High level of formal accountability: Assignment of formal accountability and broad based announcement of this accountability by at least one stakeholder group in this organization.

5 = Very high level of formal accountability: Assignment of formal accountability by multiple stakeholder groups in this organization, broad based announcement of this accountability and wide-spread discussion about and agreement regarding the appropriateness of this accountability.

Hope (Informal Expectations): The often unacknowledged, but shared, expectations regarding Project Team outcomes – if highly successful.

Hope Score: _____

1 = *No informal hope:* No expression or even apparent consideration of desired outcomes for this project by any stakeholder group in this organization.

2 = *Low level of informal hope:* Sporadic and isolated expression of desire regarding outcomes of this project by one or more stakeholder groups in this organization.

3 = *Moderate level of informal hope:* Fairly widespread and public expression of desire regarding outcomes of this project by one or more stakeholder groups in this organization.

4 = *High level of informal hope:* Widespread public expression of desire regarding outcomes of this project by many stakeholder groups in this organization.

5 = *Very high level of informal hope:* Powerful and even over-riding desire throughout the organization that this project be successful – may even be an assumption (accurate or inaccurate) that future of organization rides on the outcomes of this project.

Motivation [Internal Locus of Control] [Demand Element]

Motivation Total Score: _____

Enablement (Tangible Motivation): The direct ways in which Project Team can benefit others in the organization and, more specifically, contribute to the success of other projects.

Enablement Score: _____

1 = *No formal enablement.* No consideration by any stakeholder groups in this organization of extent to which this project team can benefit others in the organization and, more specifically, contribute to the success of other projects in this organization.

2 = *Low level of formal enactment.* Some discussion about but no formal assessment of nor planning for ways in which this project team can benefit others in the organization and, more specifically, contribute to the success of other projects in this organization.

3 = *Moderate level of formal enactment.* Assessment of and even some planning for ways in which this project team can benefit others in the organization and, more specifically, contribute to the success of other projects in this organization.

4 = *High level of formal enactment.* Assessment of and systematic planning for ways in which this project team can benefit others in this organization and, more specifically, contribute to the success of other projects in this organization.

5 = *Very high level of formal enactment.* Extensive assessment of and extensive planning for ways in which this project team can benefit others in this organization and, more specifically, contribute to the success of other projects in this organization. This project is intimately related to and interwoven with other projects in this organization.

Encouragement (Intangible Motivation): The indirect ways in which Project Team can be a champion or ever-present “colleague” to others in the organization and, more specifically, to other projects.

Encouragement Score: _____

1 = *No informal encouragement:* No expression or even apparent consideration by any stakeholder group of ways in which Project Team can be a champion or ever-present “colleague” to others in the organization and, more specifically, to other projects

2 = *Low level of informal encouragement.* Sporadic and isolated instances of Project Team or members of Project Team serving as a champion or ever-present “colleague” to other people in this organization and to other projects

3 = *Moderate level of informal encouragement.* Fairly frequent and public instances of Project Team or members of Project Team serving as a champion or ever-present “colleague” to other people in this organization and to other projects

4 = *High level of informal encouragement.* Widespread and readily documented instances of Project Team or members of Project Team serving as a champion or ever-present “colleague” to other people in this organization and to other projects

5 = *Very high level of informal encouragement.* Powerful and even over-riding commitment of Project Team and members of Project Team to serving as champions and ever-present “colleagues” to other people in this organization and to other projects. Members of this Project Team are noted for always offering “a helping hand” to others in this organization.

Triangulation [External Locus of Control] [Supply Element]

Triangulation Total Score: _____

Investment (Tangible Triangulation): The unwavering, specific and voluntary contributions of resources from elsewhere in the organization to the Project Team as a result of shared commitment to specific organizational values, vision and purposes.

Investment Score: _____

1 = No formal investment: No consideration by any stakeholder groups in this organization regarding a voluntary contribution of resources from elsewhere in the organization to the Project Team and no discussion regarding the extent to which there is shared commitment to specific organizational values, vision or purposes..

2 = Low level of formal investment. Some discussion about shared commitments, but no formal, voluntary contribution of resources from elsewhere in this organization to the Project Team.

3 = Moderate level of formal investment. Some formal, tangible and voluntary contribution of resources from elsewhere in this organization to the Project Team, based at least in part on shared commitment to specific organizational values, vision or purposes.

4 = High level of formal investment. Substantial voluntary contribution of resources from elsewhere in the organization to the Project Team based on a clearly articulated sense that there is a shared commitment to specific organizational values, vision and/or purposes.

5 = Very high level of formal investment. Extensive voluntary contribution of resources from many sources elsewhere in this organization to the Project Team that is directly related to clearly articulated and shared sense of organizational values, vision and purposes. People in this organization are willing to give

whatever they have and to sacrifice whatever it takes to make this Project successful.

Good Will (Intangible Triangulation): The sustained and honest best wishes of other stakeholder groups in this organization for the success of this project and for the successful engagement of Project Team members in this project based on shared commitment to specific organizational values, vision and purposes.

Good Will Score: _____

1 = No informal good will. No expression of good will by any stakeholder groups in the organization for the success of this project or for the successful engagement of Project Team members in this project and no discussion, even informally, by any stakeholder groups regarding shared organizational values, vision and purposes.

2 = Low level of informal good will. Sporadic and isolated expression of good will by some stakeholder groups in this organization for the success of this project and/or for the successful engagement of Project Team members in this project; minimal discussion if any regarding shared organizational values, vision and purposes.

3 = Moderate level of informal good will. Fairly widespread and public expression of good will by stakeholder groups in this organization regarding the success of this project and/or successful engagement of Project Team members in this project, often accompanied by some discussion regarding shared organizational values, vision and purposes.

4 = High level of informal good will. Widespread expression of good will by many stakeholder groups in this organization regarding the success of this project and the successful engagement of Project Team members in this project, this informal support being based explicitly on recognition of shared organizational values, vision and purposes.

5 = Very high level of informal good will. Powerful and very broad-based expression of good will by most stakeholder groups in this organization regarding the success of this project and the successful engagement of Project Team members in this project, as well as wide-ranging and frequent discussions regarding shared

organizational values, vision and purposes. Everyone seems to wish, wholeheartedly,

TEAM

Project Team Environmental Analysis

Name of Project Team Being Analyzed:

Brief Description of Project Being Analyzed:

ENVIRONMENTAL ANALYSIS

AUTHORITY

LOW _____ HIGH
2-----3-----4-----5-----6-----7-----8-----9-----10

EXPECTATIONS

LOW _____ HIGH
2-----3-----4-----5-----6-----7-----8-----9-----10

MOTIVATION

LOW _____ HIGH
2-----3-----4-----5-----6-----7-----8-----9-----10

TRIANGULATION

LOW _____ HIGH
2-----3-----4-----5-----6-----7-----8-----9-----10