



Real World Team Leadership Tool 2: Team Situation Analysis

Agenda

Date: _____

Time: _____ to _____

<p>Leader: Recorder: Timekeeper: Process Observer: Learning Observer: Parking Lot Attendant: Optional Roles:</p>	<p>e.g. Phone Coverage, Food, Interpreter</p>	
<p>Participants:</p>		
<p>Instructions</p>	<p>This is a standard format for all 8 tools. It is designed to help you lead effective, time-limited work sessions. Wrapped inside the generic format are the 5 steps you need that are unique to implementing Tool 2: Team Situation Analysis. Use this tool to assess and manage a business situation or set of issues you face today.</p>	
<p>Time</p>	<p>Steps of the Tool</p>	<p>Responsibility</p>
<p>10 Minutes</p>	<p>Meeting Overview <i>(Note: This is the standard start for all eight work session tools. Be sure to get meeting participants to contribute to these steps.)</i></p> <ul style="list-style-type: none"> ✓ Introduce participants, their roles in the organization, and their functions in the project ✓ Assign meeting roles and ensure that each has the tools they need for their role ✓ Confirm goals of meeting and the type of meeting this is ✓ Review and finalize agenda topics and their order in this meeting (This is an example of “tell ‘em what you’re going to tell ‘em”) ✓ Assign times to each topic 	<p>Leader</p>
<p>_____ minutes</p>	<p>1. Recognize All Concerns Involved <i>(Note: As with each of the other 7 tools, this first step after the meeting overview is for you to lay out all pertinent information, bring the others up to speed and define the scope of the situation. A skill applied here: “going wide” or divergent thinking to produce information through brainstorming.)</i></p> <ol style="list-style-type: none"> a) What deviations are occurring? (Variations from “business or work processes as usual.”) b) What changes do you anticipate? c) What areas should be approved? d) What decisions need to be made? e) What actions need to be taken? f) What plans should be implemented? 	<p>Leader</p>

____ minutes	<p>2. Separate Individual Concerns/Issues <i>(a skill applied here: “coming into focus” through list analysis and prioritization.)</i></p> <p>a) What concerns need clarification?</p> <p>b) How can this concern be broken apart?</p> <p>c) What actions are needed to address this concern?</p>	Participants, Leader
____ minutes	<p>3. Set Priorities for Each Concern</p> <p>a) What is the impact (on methods, resources, people, other key factors)?</p> <p>b) Who is concerned?</p> <p>c) What is the deadline for taking action?</p> <p>d) What is the trend?</p> <p>e) What will happen if nothing is done?</p>	Participants, Leader
____ minutes	<p>4. Locate Tools for Future Use/Action</p> <p>a) Which process is required?</p> <p>b) Is there a choice to make? (Tool 3: Team Decision Making)</p> <p>c) Is there an action plan to protect? (Tool 4: Team Strategic Planning)</p> <p>d) Do we need to find the cause of a problem? (Tool 5: Problem Solving)</p>	Participants, Leader
____ minutes	<p>5. Plan Resolution of the(se) Concerns <i>(Note: As with each of the other 7 tools, the final step is a “narrowing-in” step to bring clarity and closure to the process.)</i></p> <p>a) Who will do what, when, to address this concern?</p> <p>b) Use your organization’s information and/or project management tools to record and track your work.</p>	Leader
15 Minutes	<p>Administrative Wrap-up <i>(Note: This is the standard ending for all eight work session tools.)</i></p> <ul style="list-style-type: none"> ✓ Address issues in Parking Lot ✓ Review action items and accountabilities (what by whom by when). Confirm next meeting ✓ Provide Process Observer report ✓ Provide Learning Observer report ✓ Discuss: Were the goals of this meeting met? 	Parking Attndnt Recorder Process Observr Learning Observr Participants