



DEF

Unit B5 Set objectives and provide support for team members

This unit will assist you in developing your skills and knowledge to become a more effective team leader. The unit explains the principles and benefits of improving your team's performance and explores the value of effective communication in your team.

By empowering, supporting and valuing your team, you will be able to motivate and encourage your team members to meet their own work objectives, in turn meeting the overall objectives of the organisation.

The unit will explore different leadership styles and various team behaviours. There is also practical guidance to assist you in managing your team effectively.

What you will learn

- Be able to communicate a team's purpose and objectives to the team members
- Be able to develop a plan with team members showing how team objectives will be met
- Be able to support team members identifying opportunities and providing support
- Be able to monitor and evaluate progress and recognise individual and team achievement

Links to the Technical Certificate

If you are completing your NVQ as part of an Apprenticeship Framework, you will find the following topics are also covered in your Technical Certificate:

- Principles of team leading
- Developing working relationships with colleagues
- Coaching skills
- Getting results from your team
- Decision making
- Knowledge management in team leading

Be able to communicate a team's purpose and objectives to the team members

In this section we will look at the purpose of team working, how to communicate with your team members and how to set SMART objectives for your team.

Describe the purpose of a team

There are various definitions of what a team is. For instance:

A team is a number of people with complementary skills who are committed to working towards a common purpose, meeting performance goals and are accountable for their actions.

A key thing here is that a team will have a purpose. In a business environment, that purpose will link to what the organisation wants to achieve. Organisations set out their aims in their business plans, goals and objectives. They may also produce a mission statement, which will describe in a

few words what they want to achieve. From this, objectives will be set and **strategies** employed to achieve their aims. Within the organisation, teams of people will all work towards achieving individual objectives that feed into the overall mission of the organisation.

Key Term

Strategies – Tools and processes used to achieve objectives.

Team member behaviours

Members of a team have two distinct roles. First they have to achieve the goals of the team and second they have to maintain an effective working relationship with each other. These two elements are interlinked because if the goals of the team are not met, then it will inevitably put pressure on the day-to-day working relationships within the team.

Through his extensive research in the late 1970s Dr Meredith Belbin devised a world-recognised model for team preferences, which can help us to understand why team members can behave in

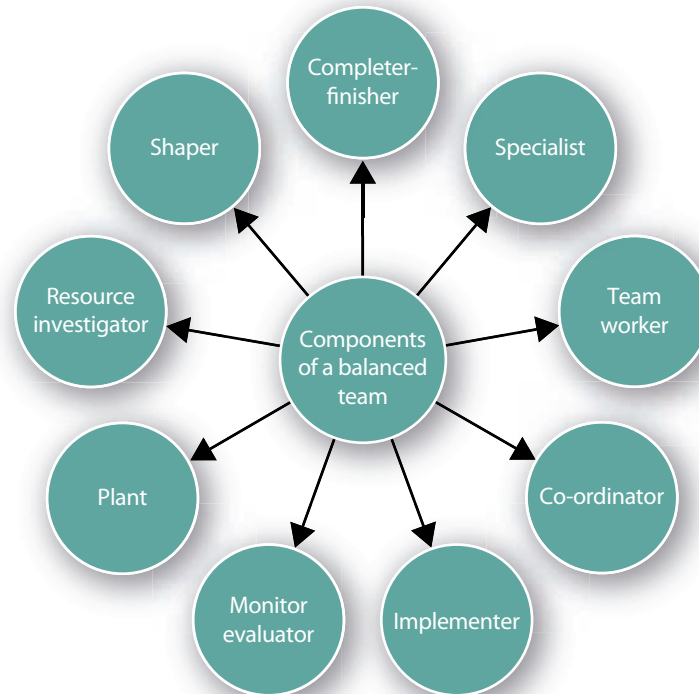


Figure B5.1 Belbin's team roles.

certain ways. He identified specific roles as shown in Figure B5.1 and outlined below.

In most teams, individual team members can take on several characteristics. Belbin argued that ‘although one person can’t be perfect, a team can be’.

The essential characteristics of each team member are:

- the completer-finisher ensures that nothing is overlooked and provides thorough attention to detail
- the specialist will be able to support the team on specialist issues and may sometimes work within a separate team
- the co-ordinator controls the activities of the team and is able to get the team working together as a complete unit
- the team worker promotes team spirit and encourages other team members through their supportive approach
- the implementer translates ideas into plans and breaks things down into tasks and actions
- the monitor/evaluator is a critical thinker, who is objective in their approach and can analyse ideas and suggestions
- the plant concentrates on the big issues and can be a source of innovation and ideas for the team; can be single minded
- the resource investigator harnesses resources for the team and networks with other teams and organisations
- the shaper makes things happen by injecting energy and strong direction.

As you can imagine, not all teams will have all of these types of people and some team members will have more than one attribute. However, these characteristics are all useful elements for a team to become fully effective.

There have been more recent studies by other experts who suggest similar personality types within teams as:

- action person
- caring person

- detail person
- co-ordinator
- creative thinker.

Again, some team members will have some or all of these attributes and don’t forget, you are a member of the team as well.

For a team to be effective the team leader should recognise how each person’s individual skills and abilities can help the team achieve its day-to-day objectives.

Portfolio Task 1



60
minutes

Links to LO1: Assessment criterion 1.1

Describe the purpose of a team. Consider your own team and check to see if you have any specific gaps, team-member types or characteristics and then try to think of a solution to resolve this. For example, if you don’t think that you have many people in your team who think creatively, what can you do to improve this? Maybe you could have a brief creative session in your team meeting from time to time and ask the team to come up with any potential new and innovative ways of working.

PLTS

By arranging a team meeting and discussing creative issues, you will be developing effective team working and encouraging your team members to be independent enquirers by allowing them to work in a creative way (TW; IE; SM).

Set SMART team objectives with its members

The organisation will set SMART objectives and these are likely to be shown in the mission statement and the overall objectives for the organisation.

Different departments or divisions within the organisation will also set SMART objectives that feed into the overall objectives of the organisation. Different teams or team leaders will

set SMART objectives or targets that feed into the departmental objectives.

Individual members of staff will also set targets in conjunction with their team leader to feed into their team's targets or objectives. Figure B5.2 shows how this would work in an organisation.

You and your team may not always realise it, but what you do on a day-to-day basis will link directly into the organisation's overall mission and objectives. If what you are doing does not link into the mission, why are you doing it?

Portfolio Task 2



60 minutes

Links to LO1: Assessment criteria 1.2, 1.3

Describe how you set SMART objectives for your team and explain how you communicate the team's purpose and objectives to the team members.

Your assessment could take the form of a written narrative or a professional discussion with your assessor. It could also include the production of workplace evidence.

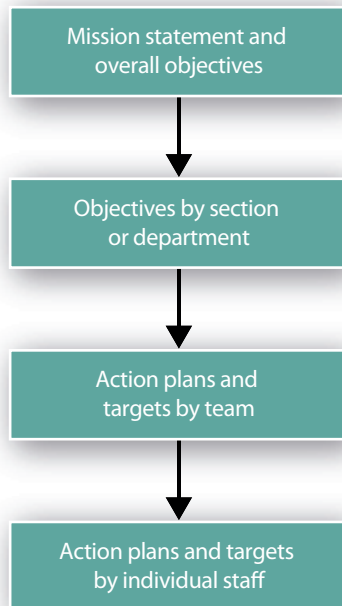


Figure B5.2 Linking organisational goals to individual targets.

Communicate the team's purpose and objectives to its members

The acronym KISS – ‘keep it short and simple’ – is an essential requirement in a business environment, both in terms of verbal and written communication. The basic principle of this approach is to:

- use fewer words
- use shorter words
- use pictures, graphs or charts where possible.

This approach can be linked to more general principles to ensure that you communicate effectively. Remember that you should:

- use the right language to fit the occasion
- use the right medium – verbal communication, emails or letters
- get the attention of the people that you are communicating with
- get your message across as you want it to be received – reduce the potential for misinterpretation or confusion
- maintain eye contact and observe the body language
- allow people to respond
- listen to what is being said to you
- be prepared to discuss issues
- don't allow team members to dominate team meetings and convince other team members that their opinion is right.

You may need to admit defeat where you are out-voted by your team. Collective decisions that the whole team agrees with are more powerful and more likely to work than decisions imposed by the team leader.

Team leadership and communication

You may have heard the statement that ‘a team leader is only as good as their team’. There is some truth in this but in some ways the opposite is also true. A team is only as good as its leader – you. The key to success for the team leader is to shape and manage their team to ensure that the relevant

Behaviour	How to achieve this outcome	Possible evidence sources
You create a common sense of purpose	Involve the team in agreeing the goals and objectives	Team objectives or appraisal targets
You clearly agree what is expected and hold people to account	Agree objectives with each team member and manage their performance	Appraisal targets or performance management information
You seek to understand people's needs and motivations	Be sensitive to the needs and expectations of the team	Notes from discussions or personal statements
You make time available to support others	Put time aside to support the team both as a group and individually	Notes from one-to-one meetings or training events
You show respect for the views and actions of others	Involve the team in the decision-making processes	Team meeting minutes or 'away day' events
You develop an atmosphere of professionalism and mutual support	Be professional at all times and encourage team members to perform well and enjoy their job	Witness testimony or achievement of objectives
You show integrity, fairness and consistency in decision making	Foster team spirit and appropriate ethics and values in the team	Team meeting minutes, witness testimony or relevant procedures

Table B5.1 How to be an effective team leader.

outcomes are achieved and also to personally demonstrate behaviours that their team needs to aspire to attain. In simple terms, the team leader must:

- make sure that their team achieves its objectives
- demonstrate professional and supportive behaviours at all times
- lead by example
- communicate clearly.

Key Term

Outcomes – the things that have been achieved.

To be an effective team leader, you will need to gain the trust and support of your team. Table B5.1 shows some practical ways on how you can do this. It also includes suggestions for evidence, which you can include in your portfolio.

The benefits of effective communication

Collaboration means working together, and the key to effective collaboration is effective communication. By working together, team members can share their values and the vision of

the organisation, develop a team spirit and absorb the information that they need to work well with each other. Trust, mutual respect and honesty between all team members is vital.

The principles of effective communication are to:

- make sure that it is a two-way process
- provide information that is clear, concise and in the right level of detail for the recipient
- ensure that everyone is clear about what is being communicated
- listen carefully to what is being said
- keep people informed on a regular basis, both in relation to general issues and their individual performance.

As a result of applying these principles, you and your team should reap the benefits and be able to work more productively. By building a positive working relationship with your team, you should see:

- less resistance to change
- improved commitment, co-operation and enjoyment of their roles
- increased output, productivity and efficiency
- improved supportive working within the team and across other team boundaries.

Listening skills

Listening is an often overlooked and underrated communication skill. How good a listener are you? Have a go at the following activity.

Activity



30 minutes

It is easy to hear someone speaking to you, but are you actually listening and understanding what they are saying to you? Complete the following short questionnaire by ticking the appropriate boxes. When you are communicating with someone, do you:

Your behaviour	Always	Sometimes	Never
Finish off their sentences			
Think that you know the point that the other person is trying to make before they have finished			
Think about what you are going to say next while the other person is still talking			
Jump to conclusions before the person has finished talking			
Interrupt people while they are talking			
Get frustrated and wish that they would get to the point more quickly			

If you find that you have ticked the always and occasionally boxes, then try to identify these issues and set out how you can improve in these areas. If you have a personal development plan, it would be a good idea to include these issues and agree a timescale to complete them in. Set yourself a SMART objective to resolve each issue.

Portfolio Task 3



30 minutes

Links to LO1: Assessment criterion 1.3

Collect examples of all of the ways that you communicate with your team. For example, formal methods, such as appraisals or target setting and more day-to-day methods, such as emails and team-meeting minutes. These will provide useful evidence for your portfolio.

PLTS

By undertaking this task and collecting examples of how you communicate with your team, you will be demonstrating how you communicate effectively with your team and how you manage performance by setting clear goals and objectives (TW; CT; SM).

Be able to develop a plan with team members showing how team objectives will be met

In this section you will learn how to discuss how team objectives will be met and how to ensure team members participate in the planning process and think creatively. This will help you develop plans to meet team objectives and set SMART personal work objectives with team members.

Discuss with team members how team objectives will be met

Once you know the targets for your team as a whole, the next stage is to plan activities in conjunction with your team members. This involves team members agreeing targets and objectives with you and may be done as part of the annual appraisal meeting. If your company does not have an appraisal system in place, you may agree objectives on a less formal basis.

Once the individual targets are agreed, then specific activities can be planned and the resources put in place. Resources include time, manpower and equipment or facilities to do the job.

As the tasks are undertaken, it will be up to you to monitor and review the performance of individuals and the team as a whole. This can be explained by Figure B5.3 and the following worked example.

Imagine that you work for a telecom company and the company's mission is to be the 'number one telecommunications provider in the UK', with their main objective for the forthcoming year being to increase sales by five per cent. Other objectives include updating the existing customer database by the end of the year.

You manage part of the customer service team and some of your responsibilities involve updating the customer database for your geographical region. You have been assigned some objectives from your manager, one of which relates to updating the customer database. These objectives are:

- Overall organisational objective 'To update the customer database by 31 December 2012'.

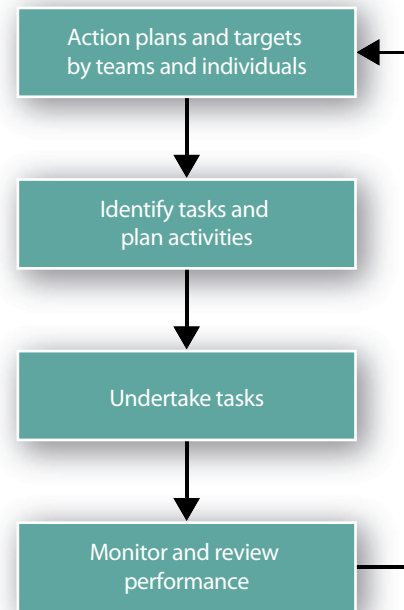


Figure B5.3 Managing team and individual targets and performance.

- As the team leader for the Eastern region of sales, your objective, set by your manager, is to complete the work required to update the database for your region by 30 November 2012.

You now need to involve your team in the process and set sub-objectives for your team members to achieve which should link into your objective.

So, how do you do it?

1. Work with your team and set sub-objectives for some or all of your team members. You may need to formulate a mini project plan to set out what you need to achieve by some agreed dates (milestones).
2. Meet with the team to explain what has to be done. This could be the whole team together, smaller groups or on a one-to-one basis as appropriate.
3. Once you have agreed a plan with your team then you need to manage and monitor their performance to ensure that they are making good progress and can meet your agreed deadline.

Be aware that you are not working in isolation. In this example other teams from different regions will also be working on their customer databases to ensure that the whole customer database is updated by the agreed date.

This is just one example and it is likely that you will have several objectives to achieve both as an individual and as a team as a whole, so careful planning is needed to ensure that you keep track of what you and your team are achieving.

Portfolio Task 4



60 minutes

Links to LO2: Assessment criteria 2.1, 2.2

Describe how you set objectives with your team members and explain how you ensure that team members participate in the planning process.

PLTS

By demonstrating that your team members actively participate in the planning process by setting targets and agreeing objectives, you will show how you allow your team to discuss how their objectives will be met. Relevant evidence, for example, appraisal documents or minutes of team meetings where you discuss these issues, will provide useful evidence for your portfolio (TW; IE; SM).

Ensure team members participate in the planning process and think creatively

In the 1960s and 1970s, Bruce Tuckman developed the team development cycle, which is still widely regarded as the definitive approach in helping us understand the different stages that teams can go through during their development. Most teams are likely to be part way through a team cycle at any given time. Tuckman suggests specific actions and strategies to adopt at the various stages. As a team leader or manager, you first need to recognise which stage your team is at and then adopt the relevant strategies for that phase. Always remember that a team is not necessarily at the performing phase just because it has been together for many years. Also bear in mind that teams who may be performing today, could, because of factors such as a lack of resources or staffing changes, move back to the forming stage at any time. Understanding the stage your team is at and managing them accordingly will help you to encourage their creativity and achieve full participation potential.

The following table shows the various stages, some of the team characteristics that you may experience and some ideas for how you can manage these stages effectively.

Stage	Team member behavioural characteristics	Your role as team leader
Forming	Polite, guarded, watchful, low level of involvement and participation, team members don't know each other	Establish clear objectives; build a supportive and open environment. Clarify the roles and expectations and get team members interacting with each other.
Storming	Difficulties can emerge, some team members opt out, resistance to change, sub-groups develop, different opinions voiced openly	Affirm your role, provide positive feedback, reiterate roles, responsibilities and objectives and manage conflict constructively.
Norming	Acceptance of roles and responsibilities, open exchange of information and opinions, active listening, working together and more co-operation	Encourage communication, tackle any issues, accept feedback, encourage ideas, creativity and innovation.
Performing	Team members are mutually supportive, high performance and increased productivity, give and receive feedback, openness, strong team identity, proud, feel secure and valued; team operating at maximum effectiveness	Encourage flexibility, delegate to and coach team members, leave the team 'to it' – empower and delegate.

Table B5.2 Team characteristics you may experience as a manager.

Activity

30
minutes

Consider your own team and check what stage you are at. Can you develop some of the strategies and actions to maximise your team's performance?

The benefits of creativity and innovation

The benefits of encouraging and recognising creativity and innovation within a team is that they create an environment where people look at their role and the organisation differently and explore all aspects, not just accepting the status quo as the most appropriate solution.

You can encourage creativity and innovation by organising group sessions. If you get everyone involved in the process, it should ensure that the whole team is on board and no one feels intimidated or uncomfortable. If you hold these types of team events say once or twice a year, your colleagues can come up with new ideas, suggestions and creative ways of working that could potentially improve efficiency and

productivity. All ideas should be considered and explored further where appropriate.

As your team develops into the performing stage then innovation and creativity should be more prevalent. Below is a brief checklist on how to encourage creativity and innovation.

- Your team members will only respond to requests for new ideas and initiatives as long as they are appreciated and never mocked.
- New ideas can involve risk taking and you need to be ready to take them on where appropriate.
- Allow team members time to think about creative ideas, for example, facilitate team events.
- Set up groups to explore ideas in greater detail.
- If an idea is approved and implemented always make sure that you thank your team member and put in place any new resources, training or support required to undertake the new or revised process.

Innovative ways of working should also be encouraged during normal day-to-day operations. Ask your colleagues if they can think of any ways to improve their job.



Creativity in a team could potentially improve efficiency and productivity.

Portfolio Task 5



30 minutes

Links to LO2: Assessment criteria 2.2, 2.4

Irrespective of the stage of development your team is currently at, how effective do you think that your team is? Complete the following questionnaire by scoring your team from 1 to 5 against each criterion and see if it identifies any issues for you to resolve.

How effective is my team?	Not effective				Very effective
	1	2	3	4	5
The team understands its objectives and targets					
Each team member understands their role and responsibilities					
A pleasant working atmosphere is in place and feedback is given and received by all					
Team members communicate well with each other					
Team members resolve disagreements					
All team members participate in discussions and the decision-making process					

Follow-up: If you have scored 2 or below in answer to any of the questions, it would be a good idea to address these issues.

PLTS

By completing this questionnaire, you will be identifying how effective your team is. As you work through each question, you will challenge each element in order to establish where any possible weaknesses may be. By undertaking this task, you will have the opportunity to proactively manage your team's effectiveness (TW; IE; SM).

round here'. It is also likely that there will be some **performance standards** in place, which you and your team will need to meet. These may include some specific targets and behaviours that you need to achieve on an on-going basis and also may include some general standards. For example, some general performance standards that all staff would need to meet may be:

- dealing with customers and colleagues quickly, courteously and efficiently
- treating everyone equally and fairly.

Some specific standards that you may set for your team may be on an individual basis, dependent on their current level of knowledge and ability, and these are likely to be linked to their targets and objectives. Your organisation may also have some specific performance targets, for example, to respond to all customer queries within five working days.

Develop plans to meet team objectives

As we have explored, teams need a common purpose to ensure that they can link into the overall objectives of the organisation. Individual team members need to be committed to their own job, but at the same time be aware and understand how what they do ensures their team meets their objective, which in turn ensures the whole organisation meets its objectives.

Most organisations have an agreed working culture: this means 'this is how we do things

It is worth remembering that not all standards will be written down or communicated overtly and there may often be an assumption that all staff will just behave to this standard anyway.

One of the key elements for improving performance is to make sure that you and your team members are **self-motivated** and enjoy your jobs. This will improve your **job satisfaction** and should get you thinking about how you might be able to improve your job role and associated processes to become more efficient.

You and your team members should be accountable for your job and take responsibility for your actions. Adopting this frame of mind enables all team members to plan their work and to start to achieve their objectives.

Key Terms

Job satisfaction – enjoying your job on a day-to-day basis.

Performance standards – minimum performance standards which need to be met by you and your team.

Self-motivated – in work terms, coming into work each day in a positive frame of mind and you are able to complete the tasks by taking ownership of your job.

How to set objectives and provide support

Take a look at these issues and challenge yourself and your team. If you think that you can improve in some of these areas, then plan to resolve the issues.

- Ensure achievement of personal and team objectives – All team members should know what is required of them and you should know how to manage this, through regular reviews, one-to-one meetings or team meetings. You also need to know what to do when things go wrong and staff are not meeting the agreed standards of performance or achieving their targets and objectives.
- How effective is your team? – Do team members trust each other? Are you all open and honest with each other? Do team members support each other? Have any recent changes affected performance?

- Do you have the right resources in place? – You may be encountering problems if you do not have the correct resources in place – time, manpower, equipment, systems, etc. You may need to resolve some issues or investigate if any new technology can be used to improve the efficiency of your team.
- Knowledge and skills – Are your team competent in their roles? Do they have adequate skills and knowledge? Do they need further additional support? Are there any skills that the whole team lacks? Is your team ready for any future challenges?

Review the issues and ask yourself the following.

- Did we achieve our targets and objectives and if so how well did we do?
- What would we do differently next time?
- If we failed to achieve our targets and objectives, what went wrong?
- Did we spend enough time planning and securing the resources to achieve our objectives?
- Did we plan the activities well and did I manage performance effectively?

Always try to plan effectively. If you plan well, there is less chance of things going wrong.

Set SMART personal work objectives with team members

As part of your job, you will plan your own work and the team's work. For regular and routine jobs, you might prepare a 'to do' list of things that you need to do that day or that week. By prioritising your tasks you will be able to plan your work more effectively. However, as a team leader you will also need to plan resources in more detail for the whole team by identifying the work to be undertaken and then planning how you are going to achieve this with the resources that you have in place.

Use the following checklist to help you plan your tasks effectively.

- Write down all of your team objectives and targets and when you need to achieve them by.

- Highlight any specific deadline dates and try to achieve them by, for example, one week ahead of the deadline.
- For larger jobs, break down the tasks into more manageable elements or formulate a small project team.
- Classify your tasks by deciding how important they are and when they need to be completed by. You can use a system to help prioritise them.
- Identify at the outset any targets that may be difficult to achieve and try to negotiate extra time or resources if required.
- Manage your objectives, resources and the performance of your team through regular consultation and communication with team members, including team meetings and one-to-one meetings.
- Don't worry if a new urgent objective comes up, just slot it into your list and plan the resources required to complete it.
- Think about what you *must* do, *should* do and *could* do.
- Always review your plan at the end of each week.

PLTS

By pulling together any relevant workplace evidence, you will be showing how you interact with your team, allow your team to think creatively and independently (TW; IE).

Functional Skills

You may be able to use this personal statement as evidence towards Level 2 Functional Skills in English: Reading and Writing. You need to demonstrate that you have understood the process involved in how you set and agree SMART objectives.

The planning function of management is an important phase as if you make mistakes by not having adequate resources in place you will not achieve your objectives.

To ensure that you plan your resources effectively, you need to:

- focus on the organisation's mission and objectives
- be clear on your own and your team's objectives and targets and agree these objectives with your team
- identify the resources that you have in place – manpower, equipment, budgets etc.
- schedule your activities and prioritise the objectives
- agree processes and procedures to undertake the activities
- manage performance and budgets.

As the tasks are undertaken, it will be up to you to monitor and review the performance of individuals and the team as a whole. It is likely that meetings with various individuals and groups of people will take place at every stage of the performance management process.

Portfolio Task 6



60 minutes

Links to LO2: Assessment criteria 2.3, 2.4

Describe how you encourage your team to think creatively and work with you to develop their own plans to meet the team's objectives.

Gather any relevant evidence demonstrating how you set and agree SMART objectives with your team members. This will provide useful evidence for your portfolio.

Be able to support team members identifying opportunities and providing support

In this section you will identify opportunities and difficulties faced by team members. You will learn how to provide advice to team members to overcome difficulties and make the most of identified opportunities.

Identify opportunities and difficulties faced by team members

Teams are very powerful and as they grow stronger and more effective, they can begin to transform the whole organisation. As a manager, you will need to utilise the strengths and expertise of individual team members, which will in turn make your whole team more efficient and effective. You will need to be able to let go of some aspects to allow your team to develop and grow; this could involve supporting and coaching individuals to further develop their own skills and knowledge. You must harness positive energy in your team and encourage team members to take the lead on certain things. By doing this, you will be:

- developing the skills, knowledge and confidence of your team
- empowering and delegating by allowing team members to control some aspects of their own work
- encouraging team members to undertake other jobs (multi-tasking) by sharing their skills and experiences with other team members
- encouraging the team to take responsibility for their own role.

Delegating

As you plan your team's work schedule for the week, month or year, you will need to identify specific members of your team who will undertake specific tasks. By delegating authority and allowing members of the team to undertake specific tasks,

you are giving the team members responsibility over some parts of their job. This can often be a motivating factor for staff as they will enjoy the control over elements of their job and they will like the fact that they can make certain decisions.

Unfortunately, not all managers are good delegators and some managers are unable or unwilling to delegate tasks. Also, some team members do not enjoy having additional responsibilities when a task is delegated to them. These team members may need additional support and reassurance as they learn to take on new tasks and responsibilities.

When you delegate, you need to be aware that it may take your team member longer to undertake the task than it would take you and also that they may not perform the task to as high a standard or mistakes may occur. However, you need to be supportive and build in additional time for your team member to guide them through the process, particularly if they are doing something new for the first time. Think back to when you were learning something new. An easy option is to think 'I can do that job much quicker, I'll just get it done'. This is not the best option. It is likely that as a team leader you will have a high workload and not enough hours in the day to get the work completed. If you do not delegate, the problem will be compounded and you will just get busier and busier and your team will be less and less effective as you try to control all of the tasks.

Always remember that as a team leader, you can delegate specific ad hoc tasks as well as regular tasks. Ask yourself 'Am I the most suitable person to be undertaking this task?'. Also bear in mind that it is not appropriate to delegate some tasks. For example, if you had some interviews planned and it was important for you to make the appointment yourself, you would not normally delegate this type of task.

Remember

Delegating work shows confidence in your team and frees you up to do other tasks.

Portfolio Task 7



Links to LO3: Assessment criteria 3.1, 3.2

How good a delegator are you? Complete the following questionnaire. This will provide useful evidence for your portfolio and might highlight some development needs that you can also include in your development plan.

My behaviour	Agree	Disagree
Some of my team members are not motivated and find their roles mundane		
Some of my team members say that they are not always that busy		
I work really long hours, but I find it difficult to delegate work to my team members		
I don't have enough time available to coach and support my team members		
I'm unhappy if my team members make mistakes		
It is quicker to do the task myself and I can get it right first time without any mistakes		

In summary, delegation gives a person the freedom and authority to undertake certain tasks or elements of their own job without the need to constantly refer issues back to their manager for a decision. They are able to make certain decisions and as a result, they are empowered and able to work more on their own initiative. They are also likely to be motivated, more effective and more productive.

By implementing the elements in Figure B5.4 you are more likely to become an effective delegator.

Discuss identified opportunities and difficulties with team members

As a team leader, you will need to be able to provide moral support, for example, if someone has personal difficulties that they need assistance

Remember

Always utilise the skills and knowledge of your team. Some team members are likely to have very detailed specialist skills. Encourage and utilise these skills to best effect.

with. You will also be required to provide practical support, for example, if a colleague is struggling to meet a specific deadline.

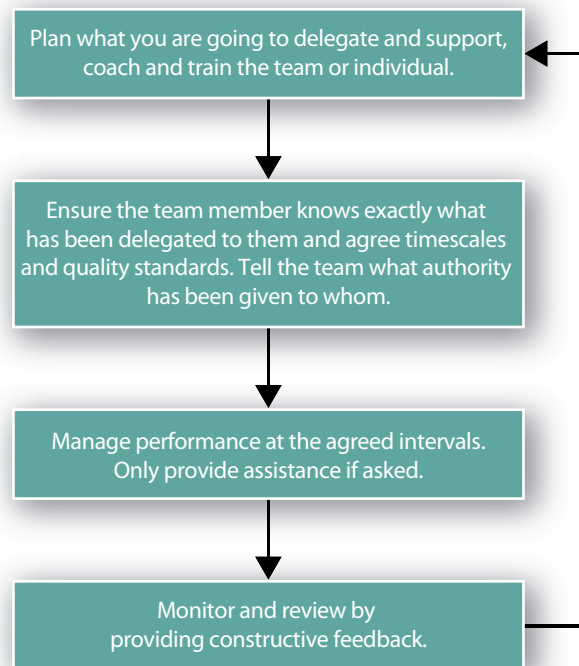


Figure B5.4 Effective delegation.

The level of support required will vary significantly from team to team and also individually. Some team members will require little or no support, whereas other team members may require regular assistance, advice and support. Care needs to be taken here as you need to be clear in your own mind what represents a reasonable level of support. For example, if a person needs regular support in relation to a routine task, then it could be because they are not competent in their role and it may be appropriate in these circumstances to review their capabilities through a formal procedure. However, if a team member needs support in relation to a new task or change in circumstance, then this is perfectly acceptable. Also remember that your colleagues can provide support to each other as specific staff with specialist knowledge may be better placed than you to provide relevant support.

Remember

Communicate effectively at all times. You never want your team members to say 'We're always the last people to know' or 'We never get to know about anything'.

The types of support and advice that your team may need will depend on a number of factors including:

- the type of organisation that you work for and the policies and culture in place
- the rewards and benefits available to staff
- the ability of your team to meet its objectives
- the mix of personalities in your team and the degree of competitiveness within the team
- the personal circumstances of your team members.

Be prepared to give time and support to any of your team members as and when they require it. Meet with them on their terms, perhaps at their workstation rather than in your office, and always be sympathetic to their needs.

Don't just think about individual support: you can support the whole team, through team building sessions, specific problem-solving meetings, team briefings, clarifying the overall objectives and planning the work to be undertaken.

Provide advice and support to team members to overcome difficulties and challenges

It is inevitable that you will have to deal with disagreements or conflicts, either within your own team or conflicts between your team and other teams. Generally speaking, these disagreements can be classified into either task-based challenges or people-based challenges.

- Task-based challenges are normally easier to solve than people based problems as they are less complex. Task-based problems relate to doing the job and examples include meeting tight deadlines, lack of skills, equipment or resource breakdown or staff absences.
- Examples of people-based challenges can include personality clashes, problems over the allocation of roles, lack of support between team members, team members blaming each other or some staff deliberately being disruptive.

Difficulties can also arise in times of uncertainty such as during periods of economic downturn or the reorganisation of a team. During these times, staff may be worried about the security of their jobs and it will be up to you to keep them informed at all times and provide relevant support and advice as required.

While you need to steer your team successfully through these challenges, you also need to recognise that you cannot control everything. As we have discussed earlier, teams are influenced by individual personalities, beliefs, personal feelings and attitudes. You can do your bit, but things which may be outside your control may sometimes go wrong.

Sometimes you may need to impose a decision or introduce a new system or process that proves unpopular. The best way to undertake this is to have an open and frank discussion with all members of the team and explain the reasons for the proposed changes. Listen to the concerns of your team members and take on board any relevant issues. If people know why something is happening and it is explained to them in person, they are much more likely to accept the changes even if they do not agree with them entirely.



Make sure that team members are supported when doing a task they have not taken on before.

Provide advice and support to team members to make the most of identified opportunities

It is critical to ensure that as a team leader you are respected by your colleagues and:

- have a positive attitude
- are an effective communicator
- are competent in your role as a team leader
- able to motivate, influence and encourage the team
- able to harness and develop the skills and knowledge within the team
- know and understand individual team members strengths and weaknesses
- able to link the team goals to the overall objectives of the organisation.

Activity

30 minutes

Think about your team and check if you possess any of the traits listed. If you think that you have any specific areas for development, make a note of them and build them into your personal development plan.

Remember to value your team. In principle, you are only as good as the team that works for you. Your team is your resource to respect, work with and hopefully achieve your objectives. Make the most of any opportunities that may arise. These could include expanding your team, developing new and innovative ways of working, creating more efficient and effective systems and keeping your colleague's skills and knowledge up to date. By doing this, you will be helping to improve the organisation overall, which should assist in providing stability longer term.

Portfolio Task 8

90 minutes

Links to LO3: Assessment criteria 3.1, 3.2, 3.3, 3.4

1. Describe what opportunities and what difficulties are faced by you and your team.
2. Describe how you communicate and deal with any difficult situations.
3. Describe how you develop opportunities for your team members and explain the structure of how this works.
4. Think of some recent examples of when you have given support to individual team members or the team as a whole. This could be through a team briefing or maybe during a one-to-one meeting.

PLTS

By describing and explaining the ways in which you interact with your team on a day-to-day basis, you will be demonstrating how you develop opportunities within the team and also how you communicate with your team effectively (TW; IE; EP; SM).

Functional Skills

You may be able to use this personal statement as evidence towards Level 2 Functional Skills in English: Reading and Writing. You need to demonstrate that you have understood the process involved in how you support your team.

Checklist

How to steer your team through difficulties and challenges.

- Recognise that difficulties and challenges will naturally occur within any team.
- Identify the simple task based issues first, e.g. lack of resources or time, and then propose a solution to resolve these issues.
- Try to encourage the team to be proactive and look for solutions to problems rather than focusing on the problem.
- Destructive conflict, which involves people insulting or criticising each other or refusing to communicate, cannot be tolerated.
- Insist on open negotiations between the various parties and try to achieve a win-win solution for all parties.
- Be able to think of a completely different solution or idea in order to diffuse the situation if required.
- Check that all parties agree with the outcome and any agreed action at the end of the discussion.

Be able to monitor and evaluate progress and recognise individual and team achievement

In this section you will look at how to monitor and evaluate individual and team activities and progress and provide recognition when individual and team objectives have been met.

Monitor and evaluate individual and team activities and progress

Managing performance is critical. You will need to monitor and evaluate individual and team performance on a regular basis. You may undertake this through some or all of the following.

- Gathering and interpreting performance information from the relevant internal systems in your organisation.
- By discussing performance with your team members on a one-to-one basis for example, through individual discussions, more formalised regular performance meetings or perhaps an annual appraisal meeting.
- By discussing performance with your team members in a group environment for example, through a daily 'stand up' ten-minute meeting or a more formalised regular team meeting.

By motivating, supporting and empowering team members, you will be allowing them to take an active role in shaping your team. It is worth remembering that a team is like a living thing: you

will be able control most elements but not all, and while you will be able to manage the team to some extent, there are other dynamics in place that you may not have control over. Ultimately the team operates on a day-to-day basis based on a number of factors including:

- your own management style
- the development stage that the team is at (forming, norming, storming, performing)
- the dynamics of the team members, including the skills, knowledge and motivations of individual team members
- your interaction with other teams and the interaction that takes place with your customers
- the resources in place and the objectives that you need to achieve with these resources
- your ability to manage performance and link it to organisational objectives
- individuals' understanding their job roles.

Empowerment is the process of allowing your team members to take control over their work and also become involved in the decision-making process.

By empowering employees, you can assist in preparing the organisation towards long-term success by developing key individuals and teams who may generate a competitive advantage for the organisation. This can be achieved by the organisation having more effective employees as a result of them being more skilled and trained than their competitors.

You will need to have a good understanding of the systems and processes in place in your

organisation, as a key part of your role will be to monitor and evaluate performance. Once you have interpreted the information, you will need to know what to do next in order to take the most appropriate action.

Provide recognition when individual and team objectives have been met

By trusting and supporting your colleagues, they can become more and more efficient and should begin to strive towards achieving excellence.

By working closely with your team you will develop their skills, knowledge and career aspirations. You can do this by:

- providing training which will develop their knowledge, skills, and competencies
- providing positive and constructive feedback on their performance
- involving team members in the decision-making process and agreeing objectives collectively
- coaching team members on a one-to-one basis and supporting their individual development
- creating a friendly environment where team members feel that their input is valued and welcomed
- creating an open-door policy whereby you make yourself available to all staff at all times
- communicating effectively with your team, by making sure that all team members know what is happening all of the time.

Once you have all of these practical elements in place, it is very likely that your team will be empowered and motivated on a day-to-day basis.

Remember

Give praise to your team and thank them when they do a good job.

Motivating your team does not have to cost much. You may be able to offer flexible working or incentive schemes. Discuss ideas with your manager and your team. It is sometimes difficult to give monetary rewards, but think of alternative ways to reward your staff.

Your team members don't just need reward, they also need recognition. You should put time aside to speak with each team member individually to acknowledge any good work they have done and see how you might improve the scope of their role or provide them with additional development opportunities.

Portfolio Task 9



60 minutes

Links to LO4: Assessment criteria 4.1, 4.2

Write a personal statement describing how you monitor and evaluate the performance of your team. Explain what processes you undertake (and their frequency) in order to ensure that performance is managed effectively.

Describe any recent achievements that your team has made and also support this with any relevant evidence.

PLTS

By demonstrating how you manage the performance of your team, you will also be detailing how the team members work together and how they participate in the performance-management process on a day-to-day basis. You may also be able to present any relevant evidence, for example any targets you have set a team member or any reviews of performance that you have undertaken (TW; EP; SM).

Functional Skills

You may be able to use this personal statement as evidence towards Level 2 Functional Skills in English: Reading and Writing. You need to demonstrate that you have understood the process of how to monitor and evaluate progress and recognise individual and team achievement.

Team talk

Jodie's story

My name is Jodie and I'm employed as a team leader in a bank in Leicester and I manage a team of eight part-time staff. I've only recently joined the company and it is the first time that I have managed a team. Part of my role is to set and agree objectives with my team and to manage their performance. I agree specific targets with each team member as part of their annual appraisal meeting, but this is something that I have not done before, so I was a little unsure what I needed to do.

I decided to arrange a meeting with my manager to ask her exactly what performance targets we were working towards achieving and how I could manage the process effectively. I knew about some of our performance targets and standards, but I needed everything to be clarified. Before the meeting, I decided that I needed to clarify:

- the exact corporate performance standards that were in place
- the specific targets that were in place for my team to achieve
- when I needed to complete the appraisals by
- how the company dealt with any training requests.

At the meeting, my manager was pleased that I had taken the time to prepare for the meeting and she explained everything to me in detail. I learnt a lot of new things about the company and as a result I was able to structure the appraisal meetings well and set and agree a number of objectives and targets with my team members. I also agreed a process to have a 30 minute one-to-one meeting with each member of my team on a monthly basis to help me manage their performance.

Top tips

Jodie did well to write down a list of all the issues. This demonstrated that she had thought about everything, and by preparing a list she was starting a structured process towards setting and agreeing the objectives and managing the team's performance.

Jodie could have researched the performance targets and objectives in a bit more detail before she met with her manager. By doing this, she would have had more of an overview of the performance standards and objectives that are already in place.

Can you think of anything else that Jodie could have done better?



Ask the expert

Q

I have to formulate a series of SMART objectives for my team. What do I need to do?

A

Begin by clarifying the team’s objectives with your manager and then begin to prepare a list of objectives by considering the following items.

- How will your objectives link to the organisation’s overall mission and objectives?
- How will you prioritise the objectives?
- Plan your resources – can you complete the objectives alone or do you need any specialist support?
- Agree dates for completing the objectives.
- Consult with your team and finalise the objectives.
- Agree the objectives with the team.
- Manage the process to ensure that you complete the objectives within the agreed time frame.

What your assessor is looking for

In order to prepare for and succeed in completing this unit, your assessor will require you to be able to demonstrate competence in:

- understanding and being able to describe the purpose and benefits of teamwork
- understanding and being able to describe the purpose of communication in teams and how to communicate effectively
- understanding the purpose and being able to plan with team members how objectives will be met
- valuing a team and being able to demonstrate how to respect and support them
- being able to monitor and evaluate team and individual achievement and provide relevant opportunities to support team members.

You will demonstrate your skills, knowledge and competence through the four learning outcomes in this unit. Evidence generated in this unit will also cross-reference to the other units in this qualification.

Please bear in mind that there are significant cross-referencing opportunities throughout this qualification and you may have already generated some relevant work to meet certain criteria in this unit. Your assessor will provide you with the exact requirements to meet the standards of this unit. However, as a guide, it is likely that for this unit you will need to be assessed through:

- one observation of relevant workplace activities to cover the whole unit
- one witness testimony may also be produced
- a written narrative, reflective account or professional discussion
- any relevant work products to be produced as evidence.

The work products for this unit could include:

- your individual and team's objectives or targets
- relevant research that you have undertaken
- emails or other communication methods that you have used in your team
- copies of any team meeting agendas and minutes
- your organisational structure
- any feedback that you have received on your performance
- your appraisal document
- examples of any creative or innovative working methods.

Your assessor will guide you through the assessment process as detailed in the candidate logbook. The detailed assessment criteria are shown in the logbook and by working through these questions, combined with providing the relevant evidence, you will meet the learning outcomes required to complete this unit.

Task and page reference	Assessment criteria
1 (page 29)	1.1
2 (page 30)	1.2, 1.3
3 (page 32)	1.3
4 (page 34)	2.1, 2.2
5 (page 36)	2.2, 2.4
6 (page 38)	2.3, 2.4
7 (page 40)	3.1, 3.2
8 (page 42)	3.1, 3.2, 3.3, 3.4
9 (page 44)	4.1, 4.2