



*A. C. Macris Consultants*

# UPDATE

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## *Highlights*

### How Teambuilding Addresses Real Workplace issues!

There is a perception that consultants either have the answers all the time, or that they have a particular answer they use but modify for every client. When Tony and I wrote our article in the Winter 97/98 issue titled Consultant/Client 2000, we spoke of non-conventional relationships with our clients. As a follow-up to that article what we are saying here is that we learn, too. In 2002, we know a lot more than we did ten years ago. Our challenge is to take our learning and improve the quality and breadth of our service.

In this context of learning indulge me in a bit of an historical perspective.

#### **Historical Perspective**

Over 25 years ago we were designing and developing Team Training for submarine sonar operators. We defined Team Training as the instructional process used to achieve cooperative and coordinated actions of individuals to attain a common goal, and to become effective team members by understanding team dynamics and processes and acquiring skills which enhance individual and team effectiveness. Team Training typically required technical individuals, with skills and knowledge in a very structured, mission-oriented context.

In this context, the team characteristics are:

- Relatively rigid in structure, organization and communication
- Well defined for member assignment, so each member's contribution can be anticipated
- Dependent on cooperative, coordinated participation of several specialized individuals whose activities contain little overlap, and who must perform their tasks to the same minimum level of proficiency.
- Often involved with systems or tasks requiring perceptual-motor activities
- Able to be guided in On-the-Job performance based on task analysis of the team's equipment, goals or situation

We define Teambuilding as the process used to increase an individual's awareness of himself or herself, as well as consideration for differences between individuals, to achieve a common goal. It involves processes which create unity of purpose and alignment of individuals with the team mission. Team building is broader based and typically is not contingent on specific task or skill proficiency.

In this context, the team characteristics are:

- Team membership defined based upon identified needs and may not be organizational or institutionalized
- Team structure not as rigid and may rotate members in and out
- Success as a function of interpersonal skills and ability to influence others
- Team objectives typically not requiring perceptual-motor activities, or high levels of specialized individual skills (there may be cases when a team needs to augment with more individuals with more specialized skill sets)

- Duration of the team's existence not a function of an overall strategic objective, but rather in response to more tactical needs

What have we learned over the past 25 years? Teams can do great things. Organizations succeed when they believe in teams. We also know that the depth of benefits have not been realized since traditional teambuilding has been focused on people having fun together. Having fun is not a bad thing. Many organizations recognize the need for their people to have fun, but when the fun stops workplace issues still remain. Therefore we believe that while teambuilding should have a component of fun, there needs to be more substance than just fun. It is true that with the fun there are varying levels of teambuilding occurring. More importantly though, in an increasingly competitive business environment, getting team performance on the job yields tangible business improvements. Therefore the time for the term TEAMBUILDING to become more than a moniker for a group getaway is now.

Teambuilding needs ultimately to be designed to address people issues in the workplace that affect business results. In the past (and even today some of the biggest firms touting teambuilding) real teambuilding has been only a by-product or happenstance of the activity. What we subscribe to is Real Teambuilding, designed based on specific customer objectives or issues known to affect performance of their people in the workplace.

Before we go much further let's look at learning in the context of adults in workplace and from the perspective of a manager, director, vice president or even a president of a company. Learning has several components as many of us understand intuitively. In a more structured context, assessing training effectiveness often entails using the four-level model developed by Donald Kirkpatrick (1994). According to this model, evaluation should always begin with level one, and then, as time and budget allows, should move sequentially through levels two, three, and four. Information from each prior level serves as a base for the next level's evaluation. Thus, each successive level represents a more precise measure of the effectiveness of the training program, but at the same time requires a more rigorous and time-consuming analysis. Below is a description of the Four Levels of Evaluation.

#### **Level I: Reaction**

Level I Reaction assesses participants' initial reactions to a course. This, in turn, offers insights into participants' satisfaction with a course, a perception of value. Trainers usually assess this through a survey, often called a "smiley sheet." Occasionally, trainers use focus groups and similar methods to receive more specific comments (called qualitative feedback) on the courses. According to the TRAINING magazine

annual industry survey, almost 100 percent of all trainers perform "Level I" evaluation.

#### **Level II: Learning**

Level II Learning assesses the amount of information that participants actually learned. Trainers usually assess this with a criterion-referenced test. The criteria are objectives for the course: statements developed before a course is developed that explicitly state the skills that participants should be able to perform after taking a course. Because the objectives are the requirements for the course, a Level II evaluation assesses conformance to requirements, or quality.

#### **Level III: Transfer**

Level III Transfer assesses the amount of material that participants actually use in everyday work six weeks to six months (perhaps longer) after taking the course. This assessment is based on the objectives of the course and assessed through tests, observations, surveys, and interviews with co-workers and supervisors. Like the Level II evaluation, Level III assesses the requirements of the course and can be viewed as a follow-on assessment of quality.

#### **Level IV: Business results**

Level IV Business results assess the financial impact of the training course on the bottom line of the organization six months to two years after the course (the actual time varies depending on the context of the course).

For many reasons, Level IV is the most difficult level to measure. First, most training courses do not have explicitly written business objectives, such as "this course should reduce support expenses by 20 percent." Second, the methodology for assessing business impact is not yet refined. Some assess this measurement by tracking business measurements, others assess by observations, some by surveys, and still others assess by qualitative measures. Last, after six months or more, evaluators have difficulty solely attributing changed business results to training when changes in personnel, systems, and other factors might also have contributed to business performance.

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Despite these difficulties in obtaining a measure, over 50 percent of organizations perform this type of evaluation on 50 percent of their courses (TRAINING, 1995). Level IV evaluation is assessment of quality. It does so in financial terms, a perspective different than that of the evaluations at Level II and Level III.

How do we apply these levels to teambuilding and why are they so important to us? Let us take the second part of that question first. These levels are important to us because unless, at a minimum, learning and transfer result then the day is spent having fun and we go back to work, talk about the fun for a few days, but have really done nothing more than just have fun. Put a price tag on that and then consider the value added to the organization. Please note, we do appreciate the need for organizations to get their people away from the normal work routine and relax, and that can be done at a company sponsored picnic or some other low cost non-facilitated activity. The people don't need to build a raft with all the parts provided just for the sake of putting something together, or swing from ropes and hope someone catches them. Another piece to this puzzle involves the cross-section of those participating in the activity. What we have seen is there are people who are more competitive than others, and if the activity caters to the competitive people there can be a negative teambuilding effect, where those who elect not to participate actually exclude themselves from the activity. This negative effect does carry into the workplace and tends to have more staying power long after the fun has been forgotten.

If a company is to commit their people for a day and has specific workplace issues that are affecting their people's effectiveness, or productivity, there must be learning and transfer. Learning and transfer to the workplace, therefore must be designed into the activity. This is how we are different.

**The result will not:**

- ◆ Be a canned program geared for just fun
- ◆ Be a waste of time
- ◆ Humour people with childish games
- ◆ Cater to one segment of a group such that others are not part of the "Team"

**The result will:**

- √ Be a tailored program to address issues that challenge the organization
- √ Be collaboration ensuring the program needed is what you get
- √ Challenge employees
- √ Expose employees to new places and introduce them to communities to enrich their experience

- √ Afford employees an opportunity to have fun while they come face to face with issues that affect their daily work lives
- √ Provide employees with tools to take back to the workplace and use long after the fun is over

**The results**

Let's go back to Kirkpatrick now.

Level 1 is Reaction – This is easy: did we have fun? Did we get our money's worth? Are we as a company satisfied with the experience? If the answers are yes, most companies feel the time and money was worth it. Does that mean anything was "learned"? The answer there, too, can be yes. In most of these experiences, people who are put together in environments outside of work typically will enjoy themselves unless they are excluded for various reasons. (An example is when there are broad age differences in a group of people and an activity is geared toward a particular age group— such as more physical tasks—then those older people who may not be inclined to or are not capable of participating are by default excluded). This works the other way also—consider a murder mystery activity, where probably little physical exertion is required, but from which those competitive types who crave action will disengage. These are the design considerations we work out with our clients to ensure we achieve the teambuilding outcomes while engaging and challenging people across a range of activities suited for their specific desire for cognitive or physical involvement.

Level 2 is Learning – This potentially takes on several dimensions, and involves a level of collaboration with the client in the pre-planning stages of the event. Consider a technology company with a predominately male workforce. Now imagine being part of the 5% female employees with a female president. The technical lead is a male who has positioned himself as the kingpin in the knowledge arena. He believes he is the one who really has control of this organization since it is a technology company. Human Resources department calls, knows there is a problem and wants to do a teambuilding activity to break some barriers. It turns out that the Board of Directors has terminated the technical lead as well as the president. The new president wants to begin rebuilding. What are the REAL issues? The issues were recognition of women in a male dominated technology company, as well as general respect.

We talked this through and designed an activity that required men to assume roles of women. The design forced each team either to volunteer, or to select individuals who would assume these roles. The activity also placed these individuals in situations where they could gain an appreciation for behaviours that did not demonstrate respect—to get people to know how others really felt. While

the activity was fun, we were able to address serious issues that affected the success of this company. Consider the impact of losing the technical lead – that was a bold leadership move, and will most probably have a significant impact. Hopefully with a greater appreciation of what others are experiencing as well as how important respect is in the workplace this company will be able to move forward with a healthier culture and workplace environment. This leads into Level III.

Level III is Transfer – Where the daily behaviours of people change. As Kirkpatrick indicates, this involves the period between six weeks and six months after the training. Considering the situation described above, if behaviours change and people in that company continue to respect each other and treat each other appropriately six months after the teambuilding event then a transfer has occurred. In this situation, measuring the effectiveness can be rather obvious and straightforward. In other situations, measurement may be more difficult (we will address that in a future article).

Level IV is Business Results – This is where REAL really counts. Quantifying the benefits of training historically has been a problem. Making the leap from a training event, session or program to business results is a major issue for several reasons. First, it takes a long time to see changes and then attribute them to any one event, thing, person, etc. Second, measures are difficult to establish, monitor and trend for the time it takes to really notice a change. That is not to say it cannot be done. As mentioned above it certainly can be done and we will talk about that in the future. The point here is that the look-ahead time frame is six months to two years. Now, once again for the Technology company (recognizing the volatility of technology companies and the turnover of people), if the culture changes as predicted and the barriers are broken down, then business results should be measurable, assuming other external issues remain relatively consistent. If the external issues change dramatically, this particular company may in fact be able to address and sustain those challenges much better than they could have without the benefit of the teambuilding activity.

#### **In conclusion**

So what have we learned? Traditional teambuilding focuses on fun with the measures of success within Level I Reaction – Yes we had fun, or it was OK for some and fun for others, or any other range of outcomes. Those who provide traditional teambuilding also provide a promise of a result. But what really has changed? REAL Teambuilding, as we are describing and providing our clients, is rooted in 25 years of learning. We are helping companies and organizations address workplace issues, learn about those issues and how to address them, transfer that learning to the workplace and hopefully realize tangible positive business results. That is why we say:

***REAL PLACES, REAL OBJECTIVES, REAL PEOPLE = REAL TEAMBUILDING and  
REAL TEAMBUILDING = REAL RESULTS.***



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