



TEAMING FOR  
**SUCCESS**

TEAM  
ASSESSMENT  
REPORT

Marshall Group

Pat Sample Company

02/20/2021

**STEWART**  
LEADERSHIP

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TEAM NAME: Marshall Group

COMPLETION RATE: 100% (10 of 10)

TEAM MEMBERS: Potsie Weber, Ralph Malph, Richie Cunningham, Arthur Fonzarelli, Joanie Cunningham, Marion Cunningham, Howard Cunningham, Jenny Piccalo, Shirley Feeney, LaVerne DeFazio

# TEAMING PERFORMANCE WHEEL

## Launching

Why are we together?

## Aligning

What are we doing?

## Trusting

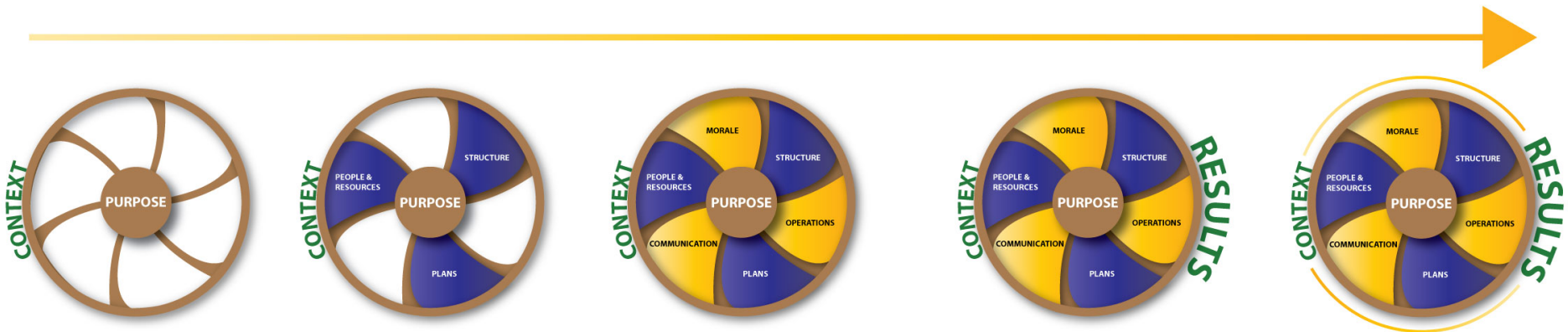
How do we work together?

## Achieving

How do we measure success?

## Renewing

How do we keep going?



Creating and leading effective teams is a critical skill for today's leaders and organizations. The Teaming Performance Wheel paints a vivid and fluid picture of what great teaming is and also the phases required to achieve it. This practical and action-oriented model outlines the development process for teams through 5 phases.

- I) Launching: Defines the team's purpose and context.
- II) Aligning: Covers structure, plans, and people and resources.
- III) Trusting: Emphasizes morale, behaviors, and communication.
- IV) Achieving: Focuses on obtaining, sustaining, and celebrating results.
- V) Renewing: Moves the team forward as they manage and respond together in changing times.

# TEAMING PERFORMANCE WHEEL



Each phase of the Teaming Performance Wheel is further defined by Teaming Dimensions:

1. Purpose
2. Context
3. Structure
4. Plans
5. People & Resources
6. Morale
7. Operations
8. Communications
9. Results

Whether you have an intact team preparing for a new challenge, or a team just starting to launch, the Teaming Performance Wheel develops crucial team behaviors and helps you manage the ups and downs of your team's journey.

## TEAMING SCORES

### PHASE I: LAUNCHING

1. Purpose



2. Context



### PHASE II: ALIGNING

3. Structure



4. Plans

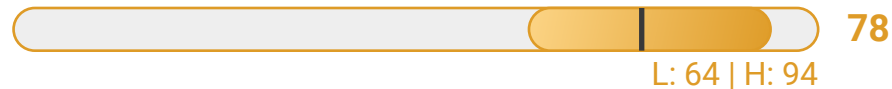


5. People &amp; Resources



### PHASE III: TRUSTING

6. Morale



7. Operations

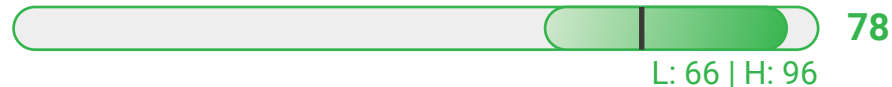


8. Communications



### PHASE IV: ACHIEVING

9. Results



### TEAMING COMPOSITE SCORE



## PHASE I: LAUNCH

1. PURPOSE	SCORE
1. Has a purpose that is meaningful to team members.	N/A 1 2 3 4 5 6 N/A: 0 L: 4   H: 6   A: 4.90
2. Has a purpose that can have a larger impact than anything accomplished on one's own.	N/A 1 2 3 4 5 6 N/A: 0 L: 4   H: 6   A: 5.00
3. Has team members who understand and agree with the team's purpose.	N/A 1 2 3 4 5 6 N/A: 0 L: 4   H: 6   A: 4.60
4. Has a clear purpose.	N/A 1 2 3 4 5 6 N/A: 0 L: 4   H: 6   A: 4.90
5. Is united in working together toward a common goal.	N/A 1 2 3 4 5 6 N/A: 0 L: 4   H: 6   A: 4.90

2. CONTEXT	SCORE
6. Is aware of the internal and external political and economic realities that can impact the team.	N/A 1 2 3 4 5 6 N/A: 0 L: 4   H: 6   A: 4.40
7. Conducts customer and competitor scans as appropriate to understand the environment.	N/A 1 2 3 4 5 6 N/A: 0 L: 4   H: 6   A: 4.50
8. Is valued by other parts of the organization.	N/A 1 2 3 4 5 6 N/A: 0 L: 4   H: 6   A: 4.80
9. Is supported by upper management.	N/A 1 2 3 4 5 6 N/A: 0 L: 4   H: 6   A: 4.80
10. Understands who are the most important internal and external stakeholders.	N/A 1 2 3 4 5 6 N/A: 0 L: 4   H: 6   A: 4.70

## PHASE II: ALIGNING

3. STRUCTURE	SCORE
11. Consists of team members who clearly understand each others role(s) on the team.	N/A 1 2 3 4 5 6 N/A: 0 L: 4   H: 6   A: 4.50
12. Involves the right people in making decisions.	N/A 1 2 3 4 5 6 N/A: 0 L: 4   H: 6   A: 5.00
13. Encourages collaboration among team members.	N/A 1 2 3 4 5 6 N/A: 0 L: 4   H: 6   A: 4.80
14. Has a team lead who can make authoritative decisions when needed.	N/A 1 2 3 4 5 6 N/A: 0 L: 4   H: 6   A: 5.00
15. Has a team lead who understands the political climate of the organization.	N/A 1 2 3 4 5 6 N/A: 0 L: 4   H: 6   A: 4.80
16. Has the authority to complete its job.	N/A 1 2 3 4 5 6 N/A: 0 L: 4   H: 6   A: 4.60
17. Has a team lead who uses his/her authority to help team members remove obstacles.	N/A 1 2 3 4 5 6 N/A: 0 L: 4   H: 6   A: 4.70
18. Has team members who have clearly assigned responsibilities.	N/A 1 2 3 4 5 6 N/A: 0 L: 4   H: 6   A: 5.00

## PHASE II: ALIGNING

4. PLANS	SCORE
19. Includes internal and external stakeholders in making plans when appropriate.	 N/A: 0      L: 1   H: 6   A: 3.30
20. Has detailed workplans that are documented and measurable.	 N/A: 0      L: 1   H: 6   A: 3.60
21. Is focused on the needs of the customer.	 N/A: 0      L: 1   H: 6   A: 4.00
22. Performs activities that are aligned to the overall purpose of the team.	 N/A: 0      L: 3   H: 6   A: 4.60
23. Keeps accurate records of project information, assignments, and team progress.	 N/A: 0      L: 1   H: 6   A: 3.20
24. Works within budgetary constraints.	 N/A: 0      L: 1   H: 6   A: 3.50
25. Assigns tasks with clear deadlines and milestones.	 N/A: 0      L: 1   H: 6   A: 3.70
26. Proactively manages risks and obstacles to accomplish its purpose.	 N/A: 0      L: 1   H: 6   A: 4.10

5. PEOPLE & RESOURCES	SCORE
27. Is provided with the necessary information, resources, equipment, and budget.	 N/A: 0      L: 1   H: 6   A: 3.40
28. Appropriately leverages the strengths of team members.	 N/A: 0      L: 1   H: 6   A: 4.50
29. Makes certain that team members receive necessary and timely training and development.	 N/A: 0      L: 1   H: 6   A: 3.20
30. Has the right level of diverse thought and backgrounds to accomplish the team's mission.	 N/A: 0      L: 1   H: 6   A: 3.80
31. Has team members with the needed skills and expertise to accomplish its purpose.	 N/A: 0      L: 1   H: 6   A: 3.40
32. Is appropriately staffed to deliver the desired results.	 N/A: 0      L: 1   H: 6   A: 3.70
33. Includes team members who value the diverse experiences of each other.	 N/A: 0      L: 1   H: 6   A: 4.60
34. Consists of team members who understand how to get things done in the organization.	 N/A: 0      L: 1   H: 6   A: 3.60



## PHASE III: TRUSTING

6. MORALE	SCORE
35. Has team members who trust each other.	
36. Promotes the participation and involvement of all team members.	
37. Has team members who successfully manage their egos.	
38. Promotes a willingness to share credit for ideas, contributions, and performance.	
39. Consists of team members who respect each other.	
40. Has team members who are highly committed to the success of the team.	
41. Consists of team members who express pride in the team.	
42. Bounces back and effectively manages through obstacles.	

7. OPERATIONS	SCORE
43. Has clear accountability processes.	
44. Has a process for creating team rules and standards.	
45. Recognizes and celebrates individual and team successes and milestones.	
46. Has a high standard of excellence.	
47. Appropriately deals with a team member who does not perform.	
48. Discusses and learns from successes, mistakes, and surprises.	
49. Productively works together to get the job done.	
50. Productively interacts with other teams.	

## PHASE III: TRUSTING

8. COMMUNICATION	SCORE
51. Has discussions focused on creating solutions, not just discussing problems.	N/A 1 2 3 4 5 6 N/A: 0 L: 4   H: 6   A: 5.10
52. Respects diverse opinions and is candid in communicating with others.	N/A 1 2 3 4 5 6 N/A: 0 L: 4   H: 6   A: 4.90
53. Effectively curtails unproductive discussions.	N/A 1 2 3 4 5 6 N/A: 0 L: 3   H: 6   A: 4.60
54. Has team members who share feedback in productive ways to improve team behaviors and results.	N/A 1 2 3 4 5 6 N/A: 0 L: 4   H: 6   A: 4.80
55. Effectively communicates with internal partners and teams.	N/A 1 2 3 4 5 6 N/A: 0 L: 3   H: 6   A: 4.50
56. Distributes information so all team members feel informed enough to accomplish the purpose of the team.	N/A 1 2 3 4 5 6 N/A: 0 L: 4   H: 6   A: 4.80
57. Effectively manages conflict among team members.	N/A 1 2 3 4 5 6 N/A: 0 L: 4   H: 6   A: 4.70
58. Has productive team meetings that help accomplish the goals and objectives of the team.	N/A 1 2 3 4 5 6 N/A: 0 L: 4   H: 6   A: 4.90

## PHASE IV: ACHIEVING

9. RESULTS	SCORE
59. Effectively communicates progress and results to upper management.	N/A 1 2 3 4 5 6 N/A: 0 L: 4   H: 6   A: 4.60
60. Effectively measures performance outcomes.	N/A 1 2 3 4 5 6 N/A: 0 L: 3   H: 6   A: 4.60
61. Regularly reviews progress on team goals, plans, and objectives.	N/A 1 2 3 4 5 6 N/A: 0 L: 4   H: 6   A: 4.90
62. Values quality and excellence in all aspects of team performance.	N/A 1 2 3 4 5 6 N/A: 0 L: 4   H: 6   A: 4.60
63. Meets or exceeds its performance goals.	N/A 1 2 3 4 5 6 N/A: 0 L: 4   H: 6   A: 5.00

**10 HIGHEST RATED BEHAVIORS**

(Based On The Average Score)

DIMENSION	BEHAVIOR	SCORE
Communication	51. Has discussions focused on creating solutions, not just discussing problems.	5.10
Operations	49. Productively works together to get the job done.	5.10
Purpose	2. Has a purpose that can have a larger impact than anything accomplished on one's own.	5.00
Structure	12. Involves the right people in making decisions.	5.00
Structure	18. Has team members who have clearly assigned responsibilities.	5.00
Structure	14. Has a team lead who can make authoritative decisions when needed.	5.00
Operations	50. Productively interacts with other teams.	5.00
Morale	39. Consists of team members who respect each other.	5.00
Morale	37. Has team members who successfully manage their egos.	5.00
Results	63. Meets or exceeds its performance goals.	5.00

**10 LOWEST RATED BEHAVIORS**

(Based On The Average Score)

DIMENSION	BEHAVIOR	SCORE
People & Resources	29. Makes certain that team members receive necessary and timely training and development.	3.20
Plans	23. Keeps accurate records of project information, assignments, and team progress.	3.20
Plans	19. Includes internal and external stakeholders in making plans when appropriate.	3.30
People & Resources	31. Has team members with the needed skills and expertise to accomplish its purpose.	3.40
People & Resources	27. Is provided with the necessary information, resources, equipment, and budget.	3.40
Plans	24. Works within budgetary constraints.	3.50
Plans	20. Has detailed workplans that are documented and measurable.	3.60
People & Resources	34. Consists of team members who understand how to get things done in the organization.	3.60
Plans	25. Assigns tasks with clear deadlines and milestones.	3.70
People & Resources	32. Is appropriately staffed to deliver the desired results.	3.70

## 10 BEHAVIORS WITH LARGEST RANGE

(Largest to Smallest)

DIMENSION	BEHAVIOR	RANGE
People & Resources	30. Has the right level of diverse thought and backgrounds to accomplish the team's mission.	5
Plans	20. Has detailed workplans that are documented and measurable.	5
People & Resources	33. Includes team members who value the diverse experiences of each other.	5
People & Resources	32. Is appropriately staffed to deliver the desired results.	5
People & Resources	34. Consists of team members who understand how to get things done in the organization.	5
Plans	24. Works within budgetary constraints.	5
Plans	26. Proactively manages risks and obstacles to accomplish its purpose.	5
Plans	21. Is focused on the needs of the customer.	5
Plans	23. Keeps accurate records of project information, assignments, and team progress.	5
Plans	19. Includes internal and external stakeholders in making plans when appropriate.	5

## 10 BEHAVIORS WITH SMALLEST RANGE

(Smallest to Largest)

DIMENSION	BEHAVIOR	RANGE
Morale	36. Promotes the participation and involvement of all team members.	1
Purpose	3. Has team members who understand and agree with the team's purpose.	2
Context	10. Understands who are the most important internal and external stakeholders.	2
Purpose	1. Has a purpose that is meaningful to team members.	2
Purpose	2. Has a purpose that can have a larger impact than anything accomplished on one's own.	2
Context	9. Is supported by upper management.	2
Context	7. Conducts customer and competitor scans as appropriate to understand the environment.	2
Purpose	4. Has a clear purpose.	2
Purpose	5. Is united in working together toward a common goal.	2
Context	6. Is aware of the internal and external political and economic realities that can impact the team.	2

## TEAM OBSERVATIONS

### 1. What are the strengths about this team?

We are talented and adaptable.

Team members are excited about the public's feedback. People love the characters in the show and love the direction we are going.

Big Egos!

Talented people. Especially me.

Everyone is really smart and hardworking.

Everyone is very kind and caring.

## TEAM OBSERVATIONS

### 1. What are the strengths about this team?

Pretty smart cookies.

We have some very strong men and women on this team. I think we can accomplish anything.

I like being with them and having fun.

All the actors go along with things pretty well. We are all adaptable.

## TEAM OBSERVATIONS

### 2. What are some of the challenges/concerns you have with this team?

We are working on a production schedule that is too tight. We need a breather.

Everyone wants more time in front of the camera.

Sometimes I feel that they don't listen to me. Maybe because I'm the youngest? I don't know.

Some ideas are really crazy.

Sometimes we goof around too much.

Sometimes I feel a little suffocated because I don't have my own tasks.

## TEAM OBSERVATIONS

### 2. What are some of the challenges/concerns you have with this team?

We are tired. The success of the show has led to tighter schedules, bringing in new talent, trying different venues. There is a lot of waiting around that I think could be eliminated.

Because we are talented and adaptable, we are overworked and I think producers are taking advantage of that.

We listen more to the guys than the girls. We all have to pay more attention to what the girls have to say.

We are getting a little burned out. Especially some of our younger actors. They are balancing work and school. It's tough on this tight schedule.



## TEAM OBSERVATIONS

### 3. What are the ways the team can improve?

Listen to ideas no matter who is sharing the idea.

Better planning. If you're not in production at that location on that day, you should not have to be there. Directors want everyone there because one of our strengths is ad lib. They want to be able to put us in when they feel like it.

Look in the mirror.

Have some criteria for how we select ideas to work on.

It's OK to goof around for a while but we still have to get things done.

We need to find a better way to help management understand that quality will soon suffer if we keep going like this.

## TEAM OBSERVATIONS

### 3. What are the ways the team can improve?

Find a way that I can communicate my way of working so that I can do more things the way I like to work.

Make sure the women are heard!

Get more support from the production company for a lighter schedule.

Get a more reasonable schedule.

## PHASE I: LAUNCHING

### 1. PURPOSE:

#### *Tips*

- Successful teams start with a clear purpose and vision for what success looks like.
- The purpose defines why the team exists and enables strategies to be created and executed.
- The purpose needs to be understood and agreed upon by all team members and provides a sense of meaning as the team works together.
- The impact the team's purpose can have is larger than what any one person can do.

#### *Key Questions:*

- Why do we exist?
- What does success look like?
- What are our strategies to accomplish our goals?

### 2. CONTEXT:

#### *Tips*

- To be successful every team must understand the broader context of how they fit within the organization, the economic and political realities with upper management and other teams, and the current marketplace trends.
- Teams need the context to know the interdependencies with other teams, the needs of the customers, and the challenges in the competitive landscape.
- Teams must know the health and strategy of the organization as they influence and are influenced by others.

#### *Key Questions:*

- What is the situation facing the team?
- What political and economic realities could impact the team?
- Who are the team's internal and external stakeholders?

## PHASE II: ALIGNING

### 3. STRUCTURE:

#### *Tips*

- The structure of the team describes the role of the team leader, the responsibilities for each team member, and the degree of collaboration on the team.
- Structure around how decisions are made and how problems are solved are critical success factors for every team.
- Determining the process to make decisions and solve problems, as well as, who has the authority to make the final decisions develops a solid structure for the team.

#### *Key Questions:*

- Is team leadership clear?
- Are roles and responsibilities clear?
- How collaborative will the team be?

### 4. PLANS:

#### *Tips*

- Creating specific and measurable work plans is important as the team translates its overall purposes into actionable steps.
- Plans involve identifying clear tasks, sequencing those tasks in helpful ways, and assigning those tasks to team members with deliverable dates and check-in points.
- Involving internal and external stakeholders as plans are created ensures future buy-in and increases accuracy of outcomes.
- Successful teams keep the customer's needs in mind as it prioritizes and is proactive about its work plans.

#### *Key Questions:*

- Does the team have a detailed work plan?
- Does each team member have clear goals and objectives?
- How well does the team prioritize?

## PHASE II: ALIGNING

### 5. PEOPLE & RESOURCES:

#### *Tips*

- Understanding existing and potential resources and talent is essential to implementing a team's purpose.
- Resources include time, equipment, supplies, information, budget and most importantly people.
- An inventory of existing or needed skills, abilities, and expertise is an important on-going part of successful team performance as goals change and evolve.
- Understanding the team's detailed resource and skill capacity is important to determine any skill gaps and how to solve for those potential gaps.

#### *Key Questions:*

- What skills and expertise do we need to have on the team?
- What budget, supplies, and equipment do we need?
- How can we address any resource and talent gaps?
- How can we best optimize our people and resources?

## PHASE III: TRUSTING

### 6. MORALE:

#### *Tips*

- Individual and team engagement and buy-in are critical underlying success factors that support the development of a high performing team.
- Recognition of efforts and understanding of personal motivations by the team's leadership, understanding of the broader team context and purpose of the team, and active participation in team activities drive strong team engagement.
- Morale can be measured in a number of ways including commitment to the team and their efforts despite obstacles, and the buy-in each team member has toward the long-term success of the team.

#### *Key Questions:*

- How committed is each team member to the team?
- Do the team members believe it can achieve success?
- How does the team bounce back and manage through obstacles?

### 7. OPERATIONS:

#### *Tips*

- Operations are the team processes and behaviors that enable highly functional team dynamics.
- Team processes include team meeting productivity, reward and recognition, learning and development, and performance management.
- Establishing healthy team processes is essential in avoiding self-oriented behaviors like blaming, withdrawing, or competing against others on the team.
- Strong teams create team rules and clear processes that build a continuous improvement mindset that hold each other accountable in positive ways.

#### *Key Questions:*

- What behaviors do we expect from each on the team?
- How do we maintain high levels of performance?
- How do we hold each other accountable?
- How do we recognize and celebrate accomplishments?

## PHASE III: TRUSTING

### 8. COMMUNICATION:

#### *Tips*

- Establishing healthy, clear and open communication processes is vital for a successful team.
- Clear communication includes ensuring meaningful dialogue, appropriate methods of communication (email, text, phone, video conferencing) are used, and information is shared so team members are informed.
- Determining how to deliver feedback, and resolve conflict is also an essential part of every team's communication processes, along with the appropriate times to collaborate.

#### *Key Questions:*

- How is information shared within the team?
- Do team members openly communicate with respect?
- How does the team share feedback?
- How does the team manage conflict?

## PHASE IV: ACHIEVING

### 9. RESULTS:

#### *Tips*

- Every high performing team must be focused on achieving high quality results.
- Great teams are clear about their results and how to measure the desired business and people outcomes.
- Successful teams rally around their desired results, improve and change to meet them, and know what success looks like.
- Effectively report progress and results to upper management and strive for high degrees of excellence.

#### *Key Questions:*

- How do we strive for excellence?
- How do we track and measure our results?
- Are we solution-focused and not problem-focused?



## TEAM IMPROVEMENT PLAN

1. What are the Team Strengths?
2. What are the Team Opportunities?
3. What are three steps the team will take to improve Team Performance?