



## **PHILLIPS ASSOCIATES**

Off-sites for Senior Leadership

*The relentless delivery of uncommon results.*

# **TAI**

## **TEAM ASSESSMENT INVENTORY**

*By  
Steven L. Phillips, Ph.D.*

**TEAM PROFILE &  
INTERPRETATION**

Name: \_\_\_\_\_

Date: \_\_\_\_\_

# **TEAM ASSESSMENT INVENTORY INTERPRETATION SECTION**

*By*

*Steven L. Phillips, Ph.D.*

**Published by**

**PHILLIPS ASSOCIATES**

**3949 Rambla Orienta | Malibu, CA 90265 | 310-456-3532 | [www.phillipsassociates.net](http://www.phillipsassociates.net)**

Copyright © 1991 by Phillips Associates. All rights reserved.

**TEAM ASSESSMENT INVENTORY**

**TEAM STRENGTHS AND WEAKNESSES**

Step 1: Collect a Team Assessment Inventory from each team member and complete the following team scoring table.

Step 2: Transfer each team member's section totals onto the Team Assessment Table below. Be sure to place the supervisor's / manager's score in row number 1.

Team Members	General Productivity & Climate I	Goals II	Roles III	Processes & Procedures IV	Relationships V	Leadership VI	Total	Team Effectiveness Index
--------------	-------------------------------------	-------------	--------------	------------------------------	--------------------	------------------	-------	--------------------------

1. Supervisor / Manager								
2.								
3.								
4.								
5.								
6.								
7.								
8.								
9.								
10.								
11.								
12.								
13.								
<b>TOTALS</b>								

**Grand Total**

**Rank Order**

--	--	--	--	--	--



### **TEAM INTERPRETATION**

There are many ways to make sense of your team scores. Perhaps the easiest and most telling is to look at the team's relative strengths and weaknesses, and the team's overall team effectiveness index.

Team strengths and weaknesses should be clear as you look at the rank ordering of each column in the Team Assessment Table. Look for a significant spread to separate the strengths from the weaknesses.

The team effectiveness index is a percentage score that will tell you how the group perceives itself versus what the optimum could be. This index can range from .20 to 1.0. Our experience suggests that teams with a Team Effectiveness Index of .75 - 1.0 are outstanding teams. A team with a Team Effectiveness Index of .50 or below suggests the team has serious problems and needs significant attention. Teams with an index of .50 - .75 are often doing many things well, but are plagued by one or two major problems.

Be sure to look at the team's strengths and weaknesses relative to the Team Effectiveness Index. If the team's index is .75 or above, the team is doing well on each team dimension (Roles, Goals, Relationships, Processes and Procedures, and Leadership) and simply may need some fine tuning.

If, on the other hand, the Team Effectiveness Index is .50 or below, consider that the team members may have rated themselves very low on every item and that the team has no stand-out strengths but will need serious work to move the team toward high performance.

If the Team Effectiveness Index is moderate (.50 - .75) then examine more closely the strengths and weaknesses to determine where the team needs work.

### **ITEM INTERPRETATION**

For a more detailed look at the team and its effectiveness, consider doing an item analysis. This analysis will go deeper into each dimension (Roles, Goals, Relationships, Processes and Procedures and Leadership) and consider the scoring for each item. This analysis takes a little more time but can yield very specific results of where the team is strong and where it may need work.

Simply total the scores of all team members for each item and divide by the number of questionnaires completed. The result will be an average score for each of the 36 items. In our experience, those items with an average score of 3.75 and above can be listed as strengths. Those with an average score of 2.25 and below can be listed as weaknesses. Brainstorming and other group problem solving methods can be used to further analyze the weaknesses. With this understanding, you can now plan an appropriate improvement strategy.

Additionally, if there are items of interest to the team, or if the team scores very low in one or two particular areas, an item analysis may be appropriate. Pick the items of interest or the lowest ranking areas to assess and follow the procedure mentioned above. The outcome should give you a much deeper understanding of areas where the team could be made stronger.

### **ACTION STEPS TOWARD TEAM IMPROVEMENT**

After you have examined the team's relative strengths and weaknesses and the team effectiveness index, this section will be helpful in determining what actions are needed. The following information will help explain why each category may have been ranked as a weakness.

#### **Goals**

Common problems with team goals include the following: 1) No clear direction or established goals; 2) The goals of individual team members conflict or are not in alignment; or 3) Team priorities shift so frequently that team members are left with unfinished projects and conflicting priorities.

Whenever goals rank low, teams should re-examine or create vision and value statements. The team should consider and discuss its purpose, its products and services, its customers and suppliers and its quality and service orientation. The team should spend some time establishing a strategic direction, setting objectives, establishing success factors and milestones and creating a schedule of action plans including what will happen, who is responsible and when it will be completed.

#### **Roles**

There are several reasons why a team may score low on roles. Common explanations include 1) Role ambiguity, when people are unclear about what is expected of them; 2) Role conflict, when people are in disagreement about who should do what; and 3) Role diffusion, when there are gaps between team member's areas of responsibility. In any of these cases, team member duties, accountabilities and areas of domain should be discussed. Questions such as "Are there overlaps or gaps in job assignments?" and "What responsibilities must be addressed?" should be asked. Furthermore, a discussion should occur about whether team members know what is expected of them and if they have adequate resources to complete their respective responsibilities.

#### **Processes and Procedures**

This is a tough category because it has to do with process / content distinctions. The content is what the team is discussing and dealing with. The process is how team members are discussing or dealing with it. If this category is low, it could mean any or all of the following things are occurring: 1) Team members are not happy with the way decisions are made; 2) Team members do not think problems are discussed or dealt with adequately; 3) Team members think either the number of meetings or meeting effectiveness is unsatisfactory; and/or 4) Team members are generally unhappy with the team's communication practices. An item analysis should be helpful to discover which problem is most relevant.

## **TEAM ASSESSMENT INVENTORY**

---

### **Relationships**

If the relationships score is low look elsewhere first. The relationships score could be low as a result of other dimensions being low; this is most likely. This dimension will also score low if the trust of the team is low. Trust is a tricky issue. In either case, there are many ways to help relationship issues, including overnight retreats and two-day off-sites. At these events experiential and job related exercises will work to build shared experiences. This will help the team members take the first step toward working together better.

### **Leadership**

If the team scored low on leadership there is usually a problem with the team supervisor or manager. It may be that he / she is inflexible and not listening to the team or that his / her style is not adaptable and flexible enough to meet diverse team member needs. Another common problem associated with a low leadership ranking is when the leader's style is "hands off." In either case, the team leader may not be aware of the problem. To overcome a low score on this dimension, the leader should be offered feedback and a discussion between the leader and team members should occur. This is always risky for team members due to fear of reprisal. Consequently, a safe and trusting environment must be created before the discussion is started or feedback given.