Teams facilitation guide

Enabling you to run your own
team session

We're here with you
every step of the way.

What is the purpose of a team session?

In a world that's always evolving, it's crucial to ensure teams are communicating effectively. Think of team sessions not just as meetings, but as chances to come together, share thoughts, and tackle challenges as a unit. Whether you're collaborating remotely or in person, these sessions provide a space to foster connections, trust, and a feeling of belonging.

When we openly discuss ideas, set clear goals, and work towards them collectively, we not only enhance productivity but also cultivate a supportive atmosphere where everyone can thrive and develop.

In the Connect platform, we've created Teams – a tool to help you gather your team's profile and run a successful team session. Such a session should include three key phases:

- **Phase 1: Get Ready** – This is where the journey begins! We'll help you gather all the necessary info, gather input, and set up your session for success. Plus, we'll guide you through creating a session in the Perform platform so you can hit the ground running.

- **Phase 2: Dive In –** It's time to bring your session to life! Explore the different team member profiles, exchange ideas, and really get the conversation flowing. We'll offer tips on kicking off your session and walking through the first couple of steps using the platform.

- **Phase 3: Reflect and Wrap Up** – As your session winds down, it's time to draw conclusions and plan your next steps. We'll walk you through step 3 on the platform and offer some suggestions for closing out the session on a high note.

When you're gearing up to host a session tailored just for your team, you have options! You can always request one of our experts to prepare and lead the session for you (check out appendix I for more details). But that's why we've put together this resource – so you can feel empowered to run your own team session like a pro.

Consider this guide your trusty sidekick to navigating the ins and outs of the Connect platform and running a killer team session with it. You can refer to this document anytime, even if you haven't had any formal training, though we do highly recommend taking the Thomas Connect certification course to really make the most of the platform.

Got questions? Need extra training? No worries! Just reach out to your Thomas contact, and we'll be more than happy to help you out.

Embrace the power of teamwork and collaboration to navigate this ever-evolving world with confidence!

Phase 1: Get Ready

Pre-session preparation

To get you started with a Teams session, there are two main areas you need to focus on in preparation for your session:

1. Current state – Where are we now?

To keep your team feeling engaged, supported, and firing on all cylinders, it's crucial to cultivate a company culture that champions effective communication, collaboration, and unity in teams. That's why we suggest taking a moment for the team to assess where things stand ahead of your session.

To gather this valuable insight, consider using the pulse survey template provided in Appendix I. You can easily put this into an online survey tool for quick and efficient data collection.

Additionally, make sure each team member has completed their profile in the Colleagues section. This not only gives everyone access to their public profile, which outlines how they operate at work, but also provides a private profile with insights tailored just for them such as:

- How to onboard
- How to manage
- How to motivate
- Approach to risk
- Dealing with conflict
- Remote working
- Management style

Confidentiality and consent

Each team member or user will have to consent to sharing their profiles before other colleagues can see them. Without this consent they won't be able to be added to or use Teams. They'll have a chance to review their results privately before having the option to share them. It may be the case that someone feels uncomfortable with the idea of their personal profiles being shared. Here are some steps to guide any team members who may feel uneasy about sharing their profiles:

- Explain why completing your profile is important and how they can benefit from this.
- Discuss the confidentiality of the test data and why sharing it can be beneficial.
- Outline how individuals can use the information shared and how it will be securely stored.

If anyone needs some extra support, it might be helpful to schedule a one-on-one feedback session before the team session. This can help address any concerns and provide clarity on their profile. You can either guide this session yourself by taking our certification course or request assistance from one of our experts in the Professional Services team to facilitate this private feedback session for you. Remember, it's crucial to **never** pressure anyone into sharing their personal information. If someone still feels uncomfortable, let's brainstorm alternative options for the team session. We're here to create a safe and supportive environment for everyone involved.

2. Goal state – Where do we want to go?

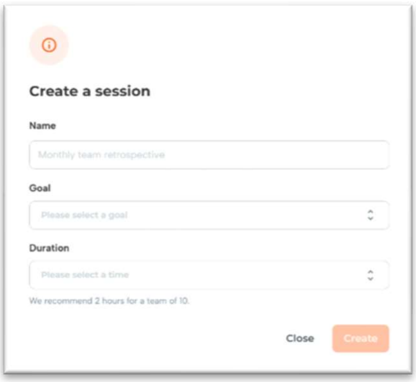
The main aim of our session is to spark lively discussions and guide teams in uncovering actionable steps to enhance their teamwork. This means we'll dive deep into discussing our desired outcomes during the team discussion segment in phase 2.

That said, we'd love for you to come prepared with an overarching idea of what you're aiming for in this session. When setting up a new session in Connect, you'll be prompted to choose from a list of goals, including:

- Build connection within the team
- Clarify roles and responsibilities
- Align team with goals
- Improve collaboration
- Improve communication
- Overcome fear of failure
- Create awareness around team strengths and weaknesses
- Make work more enjoyable
- Overcome fear of conflict
- Increase accountability
- Increase valuable outcomes from the team's work
- Other

When choosing the session goal, take cues from the team's responses in the pulse survey. Pick the one that matches up best with what they've shared.

Next, you'll be able to select the duration of your session. The platform will provide a recommended duration based on your goal and the number of team members, however you can select whichever duration works best for you.



When in doubt, we suggest giving yourself plenty of time for the session if possible. This way, each team member gets the chance to voice their thoughts and feel truly listened to and understood during our time together. Before running the session, we suggest to always preview it before going live so that you can feel comfortable with the flow of the content.

Preparing the session

In preparation of your session, make sure that each member has completed the following steps:

1. Complete and familiarize themselves with their behavioral profile. They can find this information under their profile when clicking on their name in the lefthand menu.
2. Find an interesting thing about their individual profile.
3. Think about what inspired them to their current career path.

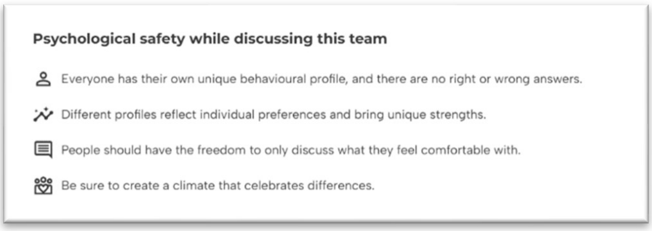
Psychological safety

Creating a safe and supportive environment is key in any team session. It's all about making sure everyone feels comfortable enough to share their thoughts, ideas, and concerns without worrying about any negative outcomes. When people feel safe to speak up, it paves the way for open and honest communication among team members.

And you know what happens when communication flows freely? Trust starts to blossom. When team members trust each other, collaboration becomes second nature. Trust is the glue that binds us together, helping us rely on each other and work towards shared goals and successes.

Now, when it comes to each team member’s profile, it's important to remember that there is no “perfect profile”. Each one brings something unique to the table, and what works for one person might not work for another. It's all about understanding how different profiles complement each other and contribute to the team dynamic.

In the Teams session, you’ll this information reflected as well.



Phase 2: Dive In

Setting the stage

Clarify the goals and intentions of the session

We recommend clarifying goals and intentions in the beginning of your session, or preferably even before the session, to set a clear direction and purpose for the meeting. Here's why it's important:

- It helps everyone know what you're aiming for.
- It aligns your team's efforts, keeping you on track and productive.
- It makes it easier for you to track progress and gauge how successful your session has been.

Notes

Step 1: Get to know your team

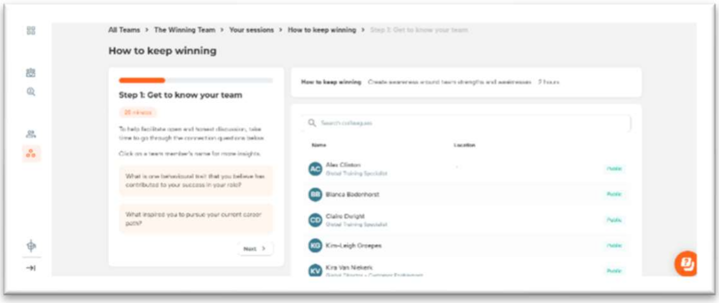
Goal: Understand the individuals in the team and how different behavioral profiles interact with each other.

Enable open and honest discussions

Creating an environment where open and honest conversations flow freely is key to building trust, fostering positive collaboration, and nurturing understanding among team members. When individuals feel safe to share their thoughts, questions, and opinions without hesitation, it sets the stage for active participation and engagement in team sessions. Embracing inclusivity means welcoming diverse perspectives and voices, which enriches problem-solving and decision-making processes. Everyone's input matters, and hearing different viewpoints leads to more well-rounded outcomes.

When team members feel safe, trusted, and respected, they're more likely to share their ideas and concerns openly. This fosters transparency and cooperation, ultimately strengthening the team dynamics and paving the way for success.

Now it is time to get to know your team. In this first step, you'll see a visualization with a list of the team members. If you want to see any of their individual profiles, you can click on someone's name to open their Colleague View.



We provide some connection questions for you to kick off the session. Ideally have each team member share their answers:

- What is one behavioral trait that you believe has contributed to your success in your role?
- What inspired you to pursue your current career path?

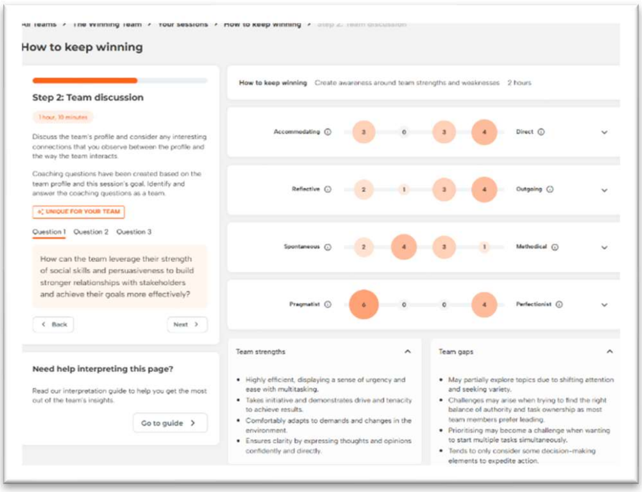
If you would like to do some extra activities for a further deep dive, we have added additional exercises for you in Appendix II. Please make sure to plan for extra time in your session if you wish to use these. Below are the exercises we suggest choosing from and use at this stage of the workshop:

- **Question bingo**
- **Top values**
- **Colleague feedback**

Notes

Step 2: Team discussion

Goal: Reflect on the collective team profile view and what can be done to improve communication and interaction to align with the goal set for this session.



In the team profile view, you'll get a snapshot of all the behavioral factors that make up your team, neatly summarized in one place. What behaviors are most predominant in the team? What are the strengths and gaps of the team? What does this mean for team performance?

In the overview, you'll notice different circles with numbers that represent how many team members fall into each category. Below that, we'll break down our strengths and potential areas for improvement. For a deeper dive into what it all means, be sure to check out the interpretation guide. It's like your trusty map for navigating the ins and outs of our team's profile!

Coaching questions

This is the stage where the team can reflect on what they believe they can do to help improve their interactions as a reflection of the session's goal. To ensure everyone understands the results and grasps the nuances among team members, we recommend highlighting the coaching questions on the right side of your screen. These questions are customized based on your session goal and team profile, making coaching feel more personal and effective. To keep the discussion going, here are some follow-up questions you can use:

- Who's contributing what input, and what insights does that offer?
- Why might individuals with different styles prefer certain approaches?
- How do motivations vary across different roles, and are we addressing those effectively?
- What benefits does our team gain from behavioral diversity?
- Are we more complementary or homogeneous?
- Where do we need to fill in gaps, and where do team members complement each other?

Feel free to spotlight any notable aspects from the exercise's answers. If necessary, ask for explanations or interpretations from individuals or the group. Emphasize both similarities and differences, tying these insights back to our team profiles. Let's use the group's feedback as a guiding thread throughout our session and for future discussions. Make sure with the team that there are clear next steps.

Additional exercises
If you would like to do some extra activities for a further deep dive, we have added additional exercises for you in Appendix II. Please make sure to plan for extra time in your session if you wish to use these. Below are the exercises we suggest you choose from at this stage of the workshop:

- **Clash or harmony of profiles**
- **Profile commonalities**

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Phase 3: Reflect and Wrap Up

Step 3: Reflect

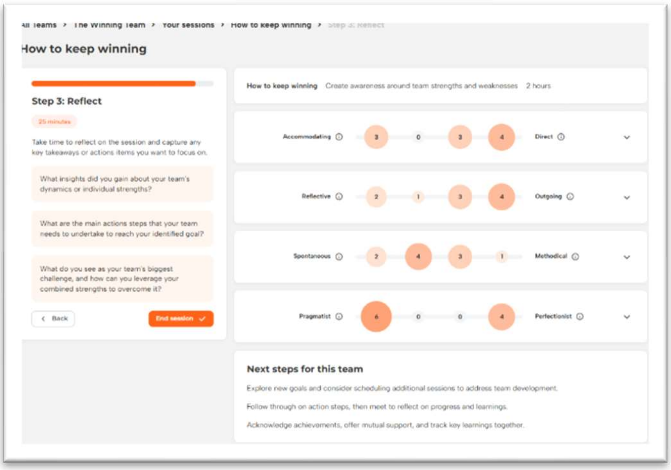
For the last step, it is time to reflect. Let's take a moment to debrief and review how the session went. You can guide the conversation by asking questions like:

- What insights did you gain about your team's dynamics or individual strengths?
- What are the main action steps that your team needs to undertake to reach your identified goal? What resources do you need to take the necessary steps?
- What do you see as the team's biggest challenge? How can you leverage your combined strengths to overcome it?

You'll find these questions conveniently listed on the left side of your screen.

Next steps

As you wrap up the session, think about what comes next based on the reflection the team has just done together. It's important to capture any decisions made and jot down the next steps you want to take. Consider scheduling future sessions focused on team development and to follow through on your action plan. We also suggest meeting again to reflect on the team's progress and what they've learned.



To track your team's development, consider sending out the same pulse questions you used before the session. This way, you can see if there have been any changes in the team's answers over time. Let's keep the momentum going!

Notes

Appendices

Appendix I: Additional resources

Training services
Facilitator training. If you would like to increase your skills, expertise of the platform, and confidence as a facilitator, spend a day with one of our expert trainers on our certification course. Here you'll gain a deeper understanding of the people science that powers our platform, be able to understand the results better, and get more adapt at answering questions about them.

Further, you can also request one of our expert trainers to facilitate a team session or any other applied knowledge workshop for you. These are virtual sessions and can be selected from a wide range of standardized workshops or tailored to your specific needs. More information on these sessions can be found on the training page on our website.

Professional services
Do you prefer to have a more technical and in-depth feedback session? Our dedicated Professional Services (PS) team who are skilled in providing individual feedback sessions in which assessment results are discussed in depth. These sessions provide each individual the opportunity to gain unique insights into their own profiles, communication preferences, motivations and work-related behavioral preferences. This in turn can be used not only for developmental purposes but it can also be tailored to assist line managers in making the most suitable recruitment decisions.

Not only can our PS team provide you with an in-depth individual feedback session, they can also run a trends analysis of the overall team to gain insight over their behavioral preferences. These can be used to inform team structures, team incentives as well as determine which behavioral, personality or aptitude indicators could predict performance in certain teams, roles or departments. This process is one which begins by gaining sufficient assessment data from the current employees and conducting an analysis to determine trends within the group. Each trends analysis is bespoke and can be customized to answer and inform your unique needs.

Other services – Pulse survey template
To ensure you have all the information you need of the current state of you team, we recommend that you send out a pulse survey to them. This will:

- Validate your views and compare them to those of the team.
- Identify the priorities as seen by the team.
- Provide a view on the current state of the team. We use this to compare the status of the team after we've completed the program.

Using Martine Haas's 5C-model, we have put together some pulse survey questions for you to use. Each question is rated on a 1-5 scale with a final free text question for any additional comments.

Pulse Survey questions:

Communication
How clear and effective is the communication within the team?
How well do you think the team listens to and understands each other during discussions?
Coordination
How clear are you about the role you play in the team/contribution you make?
Do you understand what everyone else in your team is working on?
Connection
How easy is it for you to ask for support from your team?
How often do you share your knowledge and expertise with your team colleagues?
Creativity
How well do you think the team embraces and implements innovative approaches or suggestions?
How encouraged do you feel to contribute creative ideas and solutions within the team?
Culture
What is the level of open and honest feedback amongst team members?
How would you rate the level of trust and collaboration among team members, from 1 being low to 5 being high?
Any additional comments?
Free text

Appendix II: Exercises

Clash of profiles

Consider the table below and fill in the blanks. How do you think one could perceive the other when in conflict? E.g. what would happen if a direct person clashes with a perfectionist (a), or what would happen if a methodical person clashes with an outgoing person (b)? Encourage the group to use real-life examples with colleagues if they feel comfortable to.

	Direct	Accommodating	Outgoing	Reflective	Methodical	Spontaneous	Perfectionist	Pragmatic
Direct					(d)		(a)	
Accommodating						(e)		
Outgoing							(c)	
Reflective								
Methodical			(b)					
Spontaneous								
Perfectionist								
Pragmatic							(f)	

Notes

Harmony of profiles

Consider the table below and fill in the blanks. How do you think one could perceive the other as a strength or complementing force? E.g. what positive influence could an outgoing person have on a perfectionist (c), or a methodical person on someone who is very direct (d)?

	Direct	Accommodating	Outgoing	Reflective	Methodical	Spontaneous	Perfectionist	Pragmatic
Direct					(d)		(a)	
Accommodating						(e)		
Outgoing							(c)	
Reflective								
Methodical			(b)					
Spontaneous								
Perfectionist								
Pragmatic							(f)	

Notes

Profile commonalities

Consult the table below. Think about the commonalities between the following profiles (possibly only select those that are in your team to save time). E.g. what does an accommodating person have in common with someone spontaneous (e), or a pragmatist with a perfectionist (f)?

	Direct	Accommodating	Outgoing	Reflective	Methodical	Spontaneous	Perfectionist	Pragmatic
Direct					(d)		(a)	
Accommodating						(e)		
Outgoing							(c)	
Reflective								
Methodical			(b)					
Spontaneous								
Perfectionist								
Pragmatic							(f)	

Notes

Question bingo

Have each team member select a number from 1–8. Based on the number they give, ask them to answer the question that matches to the number. If you as the facilitator are part of the team, you can go first to break the ice.

Questions to use when the team is relatively new to each other:

1	What do you enjoy doing outside of work?
2	What is a fun or interesting fact about yourself that others may not know?
3	What do you enjoy most about your work?
4	What do you enjoy least about your work?
5	How do you prefer to communicate with your colleagues (e.g., email, in-person, video calls)?
6	What is a memorable experience from your career that has shaped who you are today?
7	Can you describe a mentor or someone else who has had a significant impact on your career development?
8	How do you envision our team making a positive impact within the organization?

Questions to use when team members have already established some form of trust or relationship with each other:

1	What do you enjoy most about working with this team?
2	Please share a moment when you felt particularly proud of a (team) accomplishment.
3	Please share a lesson you've learned from a mistake or failure in your career.
4	What are some common values or principles that you think are important for your team to uphold?
5	What are your strengths, and how do you feel they contribute to the team?
6	What are some challenges you've faced in your role? How have you overcome them?
7	How do you prefer to receive feedback?
8	How can the team best support you in your professional development (e.g. developing certain skills)?

Notes

Top values

Activity:

Divide the group into smaller groups of 2–3 people. Let them discuss together what their most important values are at work (e.g. trust, transparency, open communication, honesty, etc.). Let each group agree on their three most important values. Allow the groups 5–10 minutes to discuss this before presenting it to the rest of the team. Then reflect with the team: are there large differences between sub-groups? Was it difficult to come to an agreement? If so, why? If not, what do they think made it so easy to agree?

Colleague feedback

Activity:

Option A. Time to get some feedback from a colleague! Divide the group into pairs.

- Ask them to answer the following question about the other:
  What do you appreciate most about [colleague]?

- Look at the reaction from the colleague and follow up with:
  What do you think that feedback meant to [colleague]?
  What value does showing appreciation more often add to your team?

Option B. Alternatively, if you want to take a more light-hearted approach, ask each pair to find an emoji that they find reflects their colleague best. Ask them to share it with the other and explain their choice.

Notes