



Real World Team Leadership Tool 1: Surveying

Agenda

Date: _____

Time: _____ to _____

Leader: Recorder: Timekeeper: Process Observer: Learning Observer: Parking Lot Attendant: Optional Roles:	e.g. Phone Coverage, Food, Interpreter	
Participants:		
Instructions	This is a standard format for all 8 tools. It is designed to help you lead effective, time-limited work sessions. Wrapped inside the generic format are the 4 steps you need that are unique to implementing Tool 1: Surveying. Use this tool to seek information and advice from others.	
Time	Steps of the Tool	Responsibility
10 Minutes	Meeting Overview <i>(Note: This is the standard start for all eight work session tools.)</i> <ul style="list-style-type: none"> ✓ Introduce participants, their roles in the organization, and their functions in the project ✓ Assign meeting roles and ensure that each has the tools they need for their role ✓ Confirm goals of meeting and the type of meeting this is ✓ Review and finalize agenda topics and their order in this meeting (This is an example of “tell ‘em what you’re going to tell ‘em”) ✓ Assign times to each topic 	Leader
____ minutes	1. Present the Situation or Need <i>(Note: As with each of the other 7 tools, this first step after the meeting overview is for you to lay out all pertinent information, bring the others up to speed and define the scope of the situation.)</i> <ol style="list-style-type: none"> a) Executive summary of the situation b) Background information, past history c) Specific problems, concerns, or needs in this situation d) Actions previously taken and their results e) Outline what you are least sure of and what you may not know that you need to know 	Leader

____ minutes	<p>2. Ask questions to further understand the situation (Note: As common to each of the other 7 tools, this second step is a “narrowing-in” step to bring a degree of specificity to the process.)</p> <ul style="list-style-type: none"> a) To fully understand the role of the presenter (their responsibilities, capabilities, options) b) To fully understand the role of the other people in the situation c) To fully assess other factors (e.g. resources, time, money, equipment) 	Participants
____ minutes	<p>3. Solicit feedback, information and ideas from others (brainstorm as large a list as possible). (a skill applied here: “going wide” to produce information through brainstorming)</p> <ul style="list-style-type: none"> a) Similar experiences others have had b) Contrasting experiences but useful lessons applicable to this situation c) Specific recommendations, advice 	Leader
____ minutes	<p>4. Jointly Develop an Action Plan to: (Note: As with each of the other 7 tools, the final step is a “narrowing-in” step to bring clarity and closure to the process.)</p> <ul style="list-style-type: none"> a) Stay the course, continuing to do what you are doing well (go to Tool 7: Celebrating and/or Tool 6: Implementing) b) Fix the undesirable parts of the situation (go to Tool 2: Situation Analysis and/or Tool 3: Problem Solving) c) Move toward unrealized opportunities currently available (go to Tool 4: Decision Making and/or Tool 6: Implementing) d) Move toward unrealized opportunities potentially available in the future (go to Tool 8: Strategic Planning) e) Do something else, as identified in your work session 	Leader
15 Minutes	<p>Administrative Wrap-up (Note: This is the standard ending for all eight work session tools.)</p> <ul style="list-style-type: none"> ✓ Address issues in Parking Lot ✓ Review action items and accountabilities (what by whom by when). Confirm next meeting ✓ Provide Process Observer report ✓ Provide Learning Observer report ✓ Discuss: Were the goals of this meeting met? 	Parking Atndnt Recorder Process Obsrvr Learning Obsrv Participants