



Real World Team Leadership Tool 7: Implementing

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 5 steps you need that are unique to Tool 7: Implementing. Use this tool to get stuff done.

Time

Steps of the Tool

Responsibility

10 Minutes

Meeting Overview *(Note: This is the standard start for all eight work session tools.)*

Leader

- ✓ 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
- ✓ 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

_____ minutes

1. **“The Big Picture” - Review Overall Project** *(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.)*

Leader

- a) What is the history leading up to this project?
- b) What is the purpose and what are the goals for this project?
- c) What are the “gotta haves”? By when?
- d) What are the “nice to haves”?
- e) Who is involved? Who’s not involved?
- f) What tools will you use to plan and manage this project?
- g) Identify templates for success – who else has done this or similar projects very well (or not well) that we can learn from?

____ minutes	<p>2. Plan the Project (using some level of project management tools)</p> <p>a) Review the planning tools you will be using and secure training for the team as needed to best use these tools</p> <p>b) The five elements of a project are:</p> <p>i) People factors - skill training, expectation setting, motivation, support</p> <p>ii) Methods/procedures/planning factors - the “hows”, and “whens” of a project</p> <p>iii) Material resource factors - supplies, smaller tools</p> <p>iv) Machine/equipment factors - large tools</p> <p>v) Chance or environmental factors - generally uncontrollable factors, minimized by strategic or contingency planning (like cross-training human back-ups to “Plan A”, using UPS systems for the net, tape back-up of data files, health checks of principals, etc.)</p> <p>c) Be sure that (to the extent that you can) you:</p> <p>i) Define all tasks to needed level of detail</p> <p>ii) Define all deadlines and milestones</p> <p>iii) Specify all resources and budgets</p> <p>iv) Ensure that one person owns each significant piece of the project (to clarify responsibility and accountability)</p> <p>v) Involve people “downstream” from the project as early on as possible. This includes end-users and those involved later in the project itself</p>	Leader
____ minutes	<p>3. Review the Project Plan for Understanding and Acceptance by the Team</p> <p>a) What are the strongest aspects to this plan?</p> <p>b) What is weakest? What skills, resources, tools are missing at this point?</p> <p>c) What is unclear/confusing?</p>	Leader
____ minutes	<p>4. Commit to Periodic Meetings to Review Progress and Celebrate Accomplishments</p>	Leader
	<p>5. Get Crackin’ (deploy and act on the tasks assigned)</p>	Leader
15 Minutes	<p>Administrative Wrap-up</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? 	<p>Parking Attndnt</p> <p>Recorder</p> <p>Process Observer</p> <p>Learning Observer</p> <p>Participants</p>