The Loyalist Team Assessments - Methodology, Findings, Data Reliability and Validation

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BACKGROUND

In our practice of coaching and developing teams, we recognized that teams operate at a multitude of levels of proficiency and effectiveness. Research literature and our own professional experience underscores that the majority of teams could and should be achieving higher levels of performance. A one-size fits all approach to team development does not meet the needs to of the majority of teams. And to know what the best development approach is, it is important to understand where the team stands today and what gaps or challenges exist. In our work coaching teams, we were challenged first as corporate HR practitioners and then as executive coaches to find an assessment that would help us to identify and measure the level of effectiveness on any given team.

There are dozens of assessments tools you can use to provide data and feedback at the organizational or company level including engagement surveys, organization health assessments and a plethora of business diagnostic tools. And there are also a tremendous number of tools available to assess an individual's performance including 360 feedback, performance management assessments, leadership diagnostics and personality indicators.

Yet work in organizations is by and large accomplished through and by teams. And while you can try to create a collective view of a team's performance by aggregating individual indicators or dissecting organizational health data, these approaches are scattershot and inaccurate. They don't help identify what's working best or is most challenging on a given team. Without this accurate data, most teams flounder, attempting to fix everyone or nothing, going on an "offsite" with the hope that some magical change will occur or using a slow, painful process of trial and error.

So, in 2010, after years of coaching over 2,000 teams and bumping into the limitations of other assessments and frameworks described in the appendix, we were compelled to develop a new framework to guide our efforts.

Through our collective interactions with teams for over three decades, we had already identified three distinct types of teams. We initially labeled the highest functioning and best performing teams as Loyalist Teams,

using this term to describe behaviors of team members loyal to each other and to the greater goals of the organization. The lowest performing teams we labeled as Saboteur where the behavior of team members not only damage their teammates ability to be able to work effectively but destroy value for the organization. The mid level of performance we named as Observers reflecting the passive nature of the behavior of team members.

We then set about studying and researching academic literature describing the research and findings behind what makes teams great. From that work we developed a series of questions as the basis of our first Team Contour Assessment. Working with a number of client organizations we tested our assessments extensively and as a result were able to assign teams as either Loyalist or Saboteur and further distinguish performance and impact at the Observer level between what we now call Benign Saboteur and Situational Loyalist. Benign Saboteurs may be truly unintentional in the negative impact they have on their organization where the sum of the parts is less than the whole. Situational Loyalists are generally doing good work where pockets of the team work well together but the team falls short because not all team members are fully engaged and behavior is often conditional on others taking the first step. We named this assessment "Team Contour, a Team 360."

Upon conducting an assessment, dependent on how the team scores, we categorize a team into one of four groupings based on the Loyalist Model:
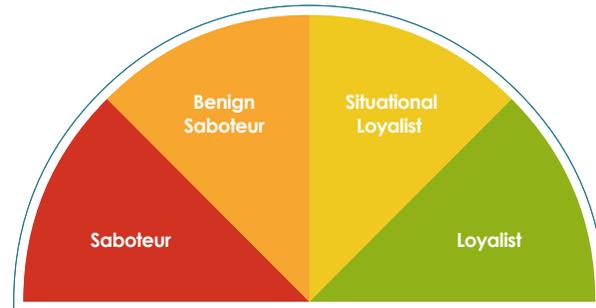
The Loyalist Team Model® and the Four Team Types

ASSESSMENT CONSTRUCT

In our initial version of the assessment, we measured five different categories:

1. Stakeholder perceptions of the team

2. Team mindset (as rated by team members and team leader)

3. Team actions (as rated by team members and team leader)

4. Team relationships (as rated by team members and team leader)

5. Team leader effectiveness (as rated by team members and team leader)

Under these five categories, there were 14 sub-categories and 31 attributes. After collecting data using the assessment from 205 teams across industries around the globe, we decided to analyze the data to

determine what characteristics of the team were most important to creating a Loyalist Team. The purpose of this review was to understand where teams could focus to get the most mileage out of their team development efforts. The insights we gathered from our database were enlightening:

Team Relationships Category

Relationships account for 70% of the variance in team type (i.e., *Relationships* is the most important dimension of Loyalist teams). The concepts measured in the Relationships scale are far and away the best predictor of a Loyalist Team. The elements measured in *Relationships* were:

- Norms of conduct
- Collaboration
- Trust
- Conflict
- Team commitment
- Accountability

Our research also found that the strength and clarity around *norms of conduct* was a strong predictor of Loyalist teams. (*Norms of conduct* refers to an agreed to set of operating principles by which a team will operate and hold each other accountable.)

In particular, our research found that compared to *Saboteur Teams*, Loyalist teams are:

- 73 times more likely to have a set of norms and behaviors we live by
- 125 times more likely to address unacceptable team behaviors promptly
- 39 times more likely to live by the norms and behaviors we have established

It may sound obvious that *collaboration* is a key element of strong teams, but we were surprised at the magnitude. Compared to *Saboteur Teams*, Loyalist teams are:

- 292 times more likely to spend time debating, discussing problems, and making decisions
- 47 times more likely to work hard to build and maintain trust
- 26 times more likely to feel comfortable asking for help from each other when they are struggling or uncertain
- 19 times less likely to mistrust each other

For a more comprehensive review of the findings from the Team Contour analysis, see Appendix 1.

Team Leader Category

While r*elationships*, *norms of behavior* and *collaboration* were key elements of creating a Loyalist team, we were surprised by the impact of the team leader. While we

Compared to Saboteur Teams, Loyalist Teams are:

292x more likely to spend time debating, discussing problems and making decisions

125x more likely to address unacceptable team behaviors promptly

106x more likely to give each other tough feedback

50x more likely to openly discuss conflict when it arises

55x more likely to have very well defined goals for the team

47x more likely to work hard to build and maintain trust

40x less likely to have "undiscussables" the team can't talk about

35x more likely to show that they are committed to each other's success

25x more likely to ask for help from each other when struggling or uncertain

the **Trispective**Group®

Data highlights from Team Contour Analysis.

acknowledge that the team leader plays a key role in setting team norms, and creating an environment conducive to collaboration and relationship building, specific leader behaviors were less predictive of team type. For example, perceptions of how well the leader manages performance, unleashes talent, provides feedback and sets a compelling purpose only accounted for 15% of the variance. While statistically significant, these behaviors were far less important compared to relationships, norms and collaboration.

Stakeholder Category (perception of team performance from outside the team)

In addition to understanding *what* contributed to loyalist teams, we also wanted to understand their impact. As part of Team Contour, we also ask "stakeholders," or those who receive support or services from the team, to provide feedback on how well the team delivered. Perhaps not surprising was the finding that:

Loyalist teams are 46 times more likely to be rated as effective by stakeholders compared to Situational Loyalists and 2000 times (yes, 2000) more than Saboteur teams.

REBRANDING TEAM CONTOUR TO THE LOYALIST TEAM 3D AND BROADENING ACCESS

After reviewing the data from 200+ teams gathered over a five year period and reflecting on our learnings in working with almost 50 organizations, we realized we had an opportunity to both fine tune the Team Contour Assessment and to make the tool accessible to a much larger pool of potential users. Through the analysis we identified questions that correlated well to the distinction in team type and questions that did not. We reviewed our language and the

labels we used and challenged ourselves to find ways to make the assessment more accessible by not restricting the use or initiation of the assessment to team leaders. In reviewing the relevance of the categories and questions, we revised the assessment to reflect 6 categories and 16 different attributes and reduced the number of questions from 77 to 63. And, as this is a team 360, we rebranded the assessment as *The Loyalist Team 3D.*

With the decision to make the assessment more broadly accessible, we drilled down into how we might further streamline the assessment, so that anyone who is on a team could simply and quickly find out their team's type. Through a series of beta tests, we developed *The Loyalist Team Snapshot*. A straightforward (and free) assessment with 18 questions that generates a brief report categorizing the team and providing some thoughtful ideas as to what actions a team member might consider.

If either a team member or team leader is interested in a more robust assessment that covers all of the categories in *The Loyalist Team 3D* other than Stakeholder input, *The Loyalist Team 1D* allows you to personally explore, through all 15 team attributes, not only where the team stands but the key opportunities for the team and insights and ideas about how to begin to address those.

For team leaders who want to understand what their team members' perspectives are and compare them to their own perceptions, then *The Loyalist Team 2D* provides that all around comparison. It identifies problematic gaps between the leader's perceptions and those of team members' across all 15 team attributes and recognizes key opportunities for the team and team leader to improve overall effectiveness and performance.

APPENDICES

1. Further findings from the analysis of Team Contour
2. Reliability and Validity of Team Contour/ The Loyalist Team 3D
3. Primary Sources in the development of Team Contour/ The Loyalist Team 3D
4. Current state of other assessments

Appendix 1
Further Findings from the Analysis of Team Contour

TEAM RELATIONSHIPS CATEGORY	COMPARED TO SABOTEUR TEAMS, LOYALIST TEAMS ARE...
Sub-category: Conflict	• 50 times more likely to openly discuss conflict when it arises. • 40 times less likely to have "undiscussables" (tough issues or concerns that no one is willing to raise).
Sub-category: Team Commitment	35 times more likely to demonstrate that we are committed to each other's' success. 2 times more likely to say people are motivated more by self-interest than the team's goals.
Sub-category: Accountability	• 29 times more likely to say it is hard for our team to challenge the status quo • 27 times more likely to publicly communicates the results we plan to achieve. • 103 times more likely that team members challenge one another to achieve high standards of performance. • 106 times more likely that team members give each other tough feedback, even if it's hard to hear. • 35 times more likely that the team holds itself accountable without an over-reliance on the team leader.
TEAM ACTIONS CATEGORY	
Sub-category: Task Alignment	4 times more likely to have tasks that meaningful to our team's core purpose
Sub-category: Roles & Responsibilities	44 times more likely to very well defined roles and responsibilities
Sub-category: Shared Team Metrics	58 times more likely to very well defined metrics to measure team performance
Sub-category: Shared Team Goals	55 times more likely to very well defined goals for the team

Sub-category: Team Meetings	4 times more likely to have a clear purpose for their meetings 5 times more likely to keep themselves informed of progress against goals to make mid-course corrections to achieve those goals (The most important aspect of team meetings is that meetings have a clear purpose (to: make a decision, generate ideas, share information, plan, and problem solve, etc.)
Sub-category: Problem Solving and Decision Making	The way teams solve problems and make decisions is important to creating a loyalist team. When looking at all of the problem solving and decision making variables on the survey, the top predictors of team type are (in rank order from strongest to weakest predictor) • Create an open and supportive setting where participants can provide honest feedback • Result in tangible actions that are implemented to improve team performance. • Identify the root causes of issues • Generate alternative solutions • Lead to clear decisions

Reliability and Validity of Team Contour/ The Loyalist Team 3D

The Team Contour Assessment has been established as both a reliable and valid instrument to assess and predict team performance.

Validation Process

- This assessment was validated using over 150 teams across multiple industries in 30 different organizations.
- Teams were selected based upon performance criteria and grouped into high-, mid- and low-performing teams.
- Team Contour results were compared against team performance to ensure the assessment accurately measured the mindset, behaviors, and activities of high, mid, and low performing teams.
- Assessment measures were continually revised over the course of a year to eliminate questions that weren't predictive of team performance.

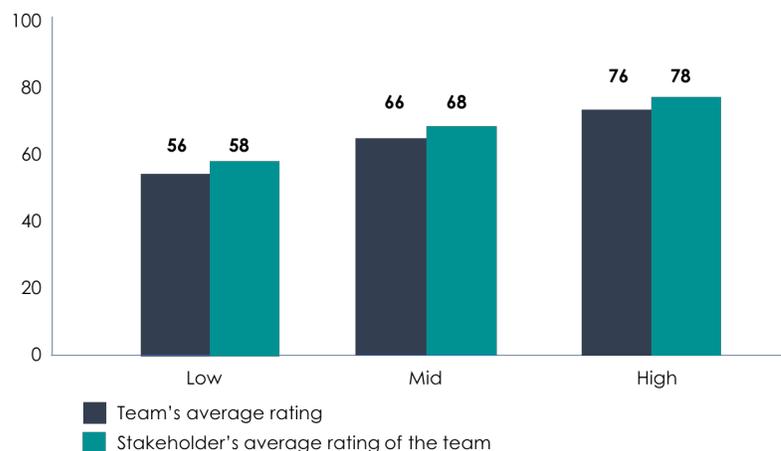**Details on Specific Measures of Reliability and Validation**

Reliability: Measures the reproducibility of the assessment.

- *Test-Retest reliability* measures the stability of the assessment over time through assessing the same sample on two different occasions.

- The Team Contour is a stable assessment.

- Test-Retest has demonstrated the reproducibility of the Team Contour results through an analysis of the overall category scores (Actions, Relationships, etc.) and the specific construct scores (Trust, Team Commitment, etc.) with demonstrated correlation coefficients ranging from (.80 to .90).

Validity: Measures how well an assessment measures what it sets out to measure. In this case – team performance.

- *Content validity* measures the validity of the assessment against the relevant content domain. In this case – team effectiveness.

- The Team Contour constructs are consistent with an extensive literature review of team dynamics and performance. This research establishes the characteristics of high performing teams along with evidence that high performing teams create greater results. See Team Contour Primary Sources for more information.

- The Team Contour concepts and questions were also extensively reviewed by experts in team development and I/O Psychology with over 100 years of collective experience.

- *Predictive validity* measures the ability of the assessment to predict the outcome it should theoretically be able to predict.

  - The Team Contour predicts team performance.

  - This is measured through an analysis of how the scores on the Team Contour assessment correlate with key stakeholder measures of team performance.

  - The average scores on the team categories of Mindset, Actions, Relationships and Team Leadership were correlated to key stakeholders' rating of team performance. Teams scoring higher in these four categories were predictive of greater team performance ratings from stakeholders with a correlation coefficient of .75.

- *Concurrent validity* measures the ability of the assessment to distinguish between groups that it should theoretically be able to distinguish between.

  - The Team Contour distinguishes between low-, mid-, and high-performing teams.

  - This provides a valuable indicator to measure team performance and allocate development resources.

Bar chart showing Low: Team's average rating 56, Stakeholder's average rating 58; Mid: 66, 68; High: 76, 78.

■ Team's average rating
■ Stakeholder's average rating of the team

Longitudinal Team Improvements

Teams that have taken the Team Contour more than once have demonstrated a high correlation of results over time. Teams that implemented improvement increased core team results (Mindset, Actions, Relationships, Team Leadership) by 10%. They had a corresponding increase in Stakeholder results of 13%. As a result, if teams receive extensive development and coaching we can predict an improvement in team performance.

Appendix 3
Primary Sources in the Development of Team Contour / The Loyalist Team 3D

In addition to the extensive experience base that Trispective brings to the tool development, we have created the assessment based on the available body of team research. Our primary sources include:

Team Effectiveness in Complex Organizations: Cross-Disciplinary Perspectives and Approaches. Edited by: Eduardo Salas, Gerald F. Goodwin, C. Shawn Burke, 2009.

Leading Teams: Setting the Stage for Great Performances. J. Richard Hackman 2002.

Senior Leadership Teams: What It Takes to Make Them Great. Ruth Wageman; Debra A. Nunes; James A. Burruss; J. Richard Hackman, Center for Public Leadership, 2008.

Team Performance Assessment and Measurement: Theory, Methods, and Applications. Michael T. Brannick, Eduardo Salas, Carolyn Prince, 1997.

The 5 dysfunctions of a Team: A Leadership Fable. Patrick Lencioni, 2002.

When Teams Work Best. Carl E. Larson and Frank M. J. LaFasto, 2001.

Team Work: What Must Go Right / What Can Go Wrong. Carl E. Larson and Frank M. J. LaFasto, 1989.

Appendix 4
Our Perspective on Other Available Assessments

While there are many approaches currently available to understanding team performance, the wrong tool can lead someone to miss the mark in developing teams and results in frustration and wasted effort. There are easily hundreds of different frameworks for understanding teams and probably even more tools supporting the development response one could take with a team. The field is highly researched so most of these frameworks and approaches are valid, some are more useful than others, but, ultimately, what is missing is a framework for knowing when to use these different methodologies. A hammer and a shovel are both good tools but you can't dig a hole with a hammer.

A framework is incredibly important. Why? Because your framework influences both your understanding as well as your development approach. If you start with the wrong framework, you aren't going to deliver the right response with the team. We believe the predominant frameworks used today can be placed into four general categories. As you will see, the category in which each fall has a strong influence on how you organize your development approach.

1. Personality- and style-based frameworks

   - *What they do:* recognize that we are all different, and conflict results from our different preferences and how we like to do things.

   - *Their usefulness:* useful for building **relationships**, resolving conflict, establishing a common language to talk about differences and understanding a team's profile.

   - *Their limitations:* they don't tell you how the team is performing. They often assume a fixed personality or stylistic state which is limiting. You can't measure improvements with the team. They ignore the consistent behaviors of top teams. These frameworks can result in overly focusing on relationships while missing essential elements of team structure and the external importance of stakeholders.

2. Lifecycle or group stages frameworks

-   ***What they do:*** explain how teams go through stages of development from team formation to performance.

-   ***Their usefulness:*** useful for understanding the progression of group dynamics and outlining this for new teams; create a common language.

-   ***Their limitations:*** difficult to use when working with established teams. Doesn't address what to do when a team stalls, gains new members or is tasked to take the business in a totally different direction. Using this framework often results in the inability to explain much of the behavior that occurs on teams as well as takes the team through an experience that doesn't align with their situation.

3. Behavioral (high performance team) frameworks

-   ***What they do:*** describe the behaviors found on top performing teams.

-   ***Their usefulness:*** useful for replicating the **behaviors** of top teams.

-   ***Their limitations:*** it's hard to start at the end (high performance) and work backwards trying to replicate high performance. There are many intermediary steps along the way to improving team performance that aren't addressed in an end-state high performance team model. You have to meet the team at their point of need. Since 80% or so of teams aren't high performing you, need a robust assessment for what these teams need and how they can improve. This results in creating a framework of high performance that could be unattainable without a progressive set of actions the team should take.

4. Type (cross-functional, project, matrix, virtual, RACI, etc.) frameworks

-   ***What they do:*** describe the different types of teams – virtual, project, cross-functional, intact, etc.

- **_Their usefulness:_** creates clarity around defining what the team is and who the team members are; resolves issues traditionally associated with responsibility for decision making, informing, etc.

- **_Their limitations:_** addresses "what" needs to be delivered but not "how" it will get done resulting in poor communications flow, development of silos and limited opportunities for the development of trust and strong authentic team relationships. This results in an over emphasis on task related areas while ignoring important relationship (maintenance) functions.