**Marker Guide 3**

**DIPLOMA OF PRACTICE MANAGEMENT**

Lead and Manage Team Effectiveness

BSBWOR502



First Edition, January 2023

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SHORT RESPONSE QUESTIONS

Section 1

Establishing Team Performance Plan

Teams in the Workplace

1.1 It is important for all team leaders and managers to know how to develop effective, high-performing teams. One highly useful theory that that explains team performance throughout the stages of team development is Tuckman’s Stages of Team Development model.

Briefly explain Tuckman’s five stages of team development and how the group dynamics at each stage can support or hinder team performance. (Your response should be approximately 200 words)

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| Student’s response must demonstrate an understanding of Tuckman’s theory as well as explain how group dynamics can support or hinder team performance.  Responses should reflect an understanding of the following:   * First stage is the forming stage. Individuals are familiarising themselves with work role, each other, task direction, etc, and rely on manager for guidance. There is little conflict and team performance is average. * Second stage is storming. In this stage individuals still view themselves as individuals and conflict and communication issues arise due to competitiveness and conflict as individuals share more opinions/feelings. Team performance declines. (Student may also identify that managers can help get group through this stage by focusing them on team’s purpose and encouraging cooperation and acceptance of alternative viewpoints) * Third stage is norming, in which the individuals start to feel part of a team, know their role in it, and focused on team’s purpose. Individuals realise that they can achieve goals by accepting other viewpoints. Team performance improved throughout this stage. * Fourth stage is performing, in which the team performance is high because all team members are doing their part to contribute to the team’s goals and desired outcomes. * The final stage is adjourning, in which the team assesses performance or transitions/wraps up. Good performance is recognised. |

1.2 Group dynamics can bring different impacts on a group’s performance, including positive and negative impacts.

a) Identify and briefly explain two (2) positive impacts of good group dynamics on team performance. (Your response should be approximately 60 words)

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| Responses must demonstrate an understanding of the positive impacts of good group dynamics on team performance.  Example response:   * Good and strong leadership – Good leaders are able to inspire the team members to achieve their full potential. * Yields better results and productivity – When the team has a good dynamic, each member will be working and performing at their fullest potential which increases productivity. * Encourages great collaboration – Good dynamics allow individuals to work in a relaxed state, which can encourage higher levels of cooperation and collaboration amongst the team members. With that, they may offer new ideas to facilitate the work progress. |

b) Identify and briefly explain two (2) negative impacts of poor group dynamics on team performance. (Your response should be approximately 60 words)

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| Responses must demonstrate an understanding of the negative impacts of poor group dynamics on team performance.  Example response:   * Weak leadership – Without a strong leader, the team may lack a clear and specific direction which end up focusing on the wrong priorities. * Blocking behaviours – Some behaviours like being overly critical of others’ contributions, not participating in discussions, and disagreeing with other members’ ideas except their own. * Groupthink – While team members aiming for consensus within a group can help progress work, often, individuals do so by setting aside their own opinions and beliefs just to remain polite and ‘keep the peace’ within the group. * Social loafing – When individuals are being judged and viewed as a group or a team, some team members might put in less effort than when they are working alone or being judged individually. |

Developing Performance Plans for the Work Team

1.3 One critical task to improve team performance is to develop performance plans.

a) Identify and briefly describe five (5) elements that are typically included in a team performance plan. (Your response should be approximately 150 words)

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| Responses must demonstrate an understanding the elements that are included in a team performance plan.  Example response:   * **Expected outcomes**. The expected outcomes should be drawn from organisational goals. They refer to what needs to be achieved, such as the main tasks, projects, and deliverables. * **Outputs**. Outputs refer to the actions the team will have to take to achieve the expected outcomes. This section of the plan should outline how work will be done and the specific behaviours the team will use or develop while at work. * **Goals**. The expected outcomes must be broken down into achievable, measurable goals for the team. Goals should be developed using the ‘SMART’ framework: * **Key performance indicators (KPIs)**. KPIs are a tool used to measure whether the team or individual is on track to achieve their expected goals. * **Support required**. There must be a clear understanding of what support the team as a whole or individual team members will require to ensure they meet their goals. |

b) Imagine you are the practice manager at the local general practice. Briefly outline three (3) strategies that you could use when developing a team performance plan. (Your response should be approximately 45 words)

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| Responses must demonstrate they understand the effective process for the development of a team performance plan.  Example response:   * Consultation/group discussion * Arranging a meeting (choosing appropriate time based on availability/workloads and arranging a venue where team will feel able to contribute and not get interrupted). * Prepare agenda that outlines areas/points that need to be covered. * Advise team on any preparation they should do before meeting. * Ensure that everyone has the opportunity to contribute. * Use information gathered during meeting to develop team performance plan. |

Supporting Team Members to Meet Expected Outcomes

1.4 As a manager, it will be your responsibility to support team members to achieve both their individual and team performance plans. Identify five (5) general types of support a manager can provide to help a team meet their expected performance outcomes. (Your response should be approximately 40 words)

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| Student’s response must outline five ways team managers can provide support team members to help meet expected performance outcomes.  Responses may include but are not limited to:   * Explaining or clarifying policies, procedures, instructions * Assisting with solving problems * Providing encouragement and recognise team members achievements in order to foster a positive attitude * Providing feedback * Providing training * Providing coaching and mentoring * Ensuring team members have the resources they need to perform their role |

Integrating Your Knowledge

Read the information below and answer the following questions.

To respond to the questions in this part of the Assessment Book you are to imagine that you are the newly employed Operations Manager for Tranquillity Wellness Centre, a holistic health and wellness centre located in the inner suburbs of Brisbane. Part of your responsibilities include managing the centre’s team of Wellness Practitioners. When starting your role, you review a number of Tranquillity documents on the organisation’s staff intranet to help develop an understanding of both your and your team’s key responsibilities as well as Tranquillity’s goals, plans, and objectives (see below).

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| **Tranquillity Wellness Centre**  **Position Description – Operations Manager**  The following position description describes the responsibilities and performance outcomes required to perform the role of Operations Manager at Tranquillity Wellness Centre.  **RESPONSIBILITIES**   * Managing the team of wellness practitioners * Accountability for the team of wellness practitioners meet their responsibilities * Directing the team’s activities * Driving team performance * Providing the team of wellness practitioners with a stimulating and supportive environment * Assisting the CEO with setting performance targets * Maximising sales and profitability * Maintaining and increasing standards of customer service   **OTHER SKILLS REQUIRED**   * Highly developed communication skills * The ability to work under pressure * Confidence, drive and enthusiasm * Decision-making ability and a sense of responsibility * Planning and organisational skills * Commercial acumen |

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| **Tranquillity Wellness Centre**  **Position Description – Wellness Practitioner**  The following position description describes the responsibilities and performance outcomes required to perform the role of Wellness Practitioner at Tranquillity Wellness Centre.  **RESPONSIBILITIES**   * Meet with clients * Examine clients * Perform a range of tests * Diagnose conditions and illnesses * Discuss treatment options * Design treatment plans * Keep accurate patient records * Some manual handling including manual handling of people * Other duties as required   **PERFORMANCE CRITERIA**   * Hold a recognized qualification in one or more of the following areas:   + Naturopathy   + Chiropractic   + Osteopathy   + Homeopathy   + Acupuncture   + Massage therapy   + Meditation * Hold a current first aid certificate * Demonstrated ability to build client relationships * High level interpersonal skills and ability to relate to a wide range of clients * Be professional, friendly, and approachable * Be discreet, tactful, and confidential at all times |

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| **Tranquillity Wellness Centre**  **Code of Ethics**  Tranquillity Wellness Centre prides itself on its professionalism and ethical conduct when dealing with clients, colleagues, suppliers and the general community. This code in conjunction with the law and Tranquillity’s policies and procedures is designed to guide Tranquillity employees in discharging their duties. To the best of their abilities Tranquillity employees should consistently strive to uphold the following principles.  **WORKING WITH PEOPLE**   * Treat others with respect and fairness in all dealings internally and externally. * Value diversity among all people, both inside and outside the organisation. * Promote a work environment which is safe and free from harassment and bullying. * Enhance the knowledge, skills, and abilities of our people. * Promote a healthy and productive balance between our work and personal lives. * Protect the privacy and confidentiality of our employees and our customers. * Report suspected unethical behaviour by a colleague without fear of retribution. * Provide and accept constructive feedback for the purpose of personal and professional development. |

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| **Tranquillity Wellness Centre**  **Strategic Plan**  Tranquillity Wellness Centre is a Brisbane based holistic health and wellness company. Tranquillity currently offers a range of holistic health services including chiropractic, acupuncture, naturopathy, homeopathy, meditation and massage therapy. Tranquillity’s clients are mostly female, middle-income earners, who are interested in leading a healthy lifestyle or suffer from chronic illness. The following strategy and goals were developed by the management team at tranquillity Wellness Centre.  **STRATEGY**  tranquillity Wellness Centre will provide its clients with the highest level of health, healing and wellness services in a supportive, safe and relaxing environment. Tranquillity’s wellness practitioners will provide clients with holistic solutions to their health and wellness needs by incorporating knowledge from a wide range of natural and alternative therapies. Tranquillity’s management team will invest in infrastructure and training in preparation for high growth periods to come.  **GOALS**   * Maintain an employee satisfaction rate of over 85% for the next 12 months. * Increase profits by 12% each year for the next three years. * Increase Tranquillity’s brand recognition. * Implement a plan to introduce two new Tranquillity centres in the next 5 years. * Increase revenue by $60,000 annually through sales of related wellbeing products |

1.5 You notice that your team does not currently have a team charter. You decide that you want to consult with the team members to develop one so you decide to hold a team meeting in which you will consult with the team to generate a team charter. This document will clearly establish and document the team’s purpose, roles, responsibilities, and accountabilities in line with Tranquillity’s organisational goals, plans, and objectives.

In the space below, draft an email to be sent to the team members to inform them of the meeting’s purpose, any preparation they should make, and any organisational documents they should consult before preparing for the meeting. Note: you can assume that the team of wellness practitioners have access to the above documents on the staff intranet. (Your response should be approximately 150 words)

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| Responses will vary but should inform the team of the meeting’s purpose, provide them with the context and purpose of the team charter and ask them to consider the team’s roles responsibilities and accountabilities. The team should also be directed to consult relevant organisational documents before the meeting.  Example response:  To: allwellnesspractitioners@tranquillity.net.au  From: operationsmanager@tranquility.net.au  Subject: Team Charter Meeting  Dear Wellness Practitioners,  This email is to inform you all of an upcoming meeting where we will work together to develop a team charter. This meeting will take place at 10am in the conference room on xx/xx/xxxx.  The reason for developing this team charter is to establish a common understanding of our team’s purpose, as well as team member’s roles, responsibilities and accountabilities in accordance with Tranquillity’s goals and objectives. Having a full understanding of these factors will allow us to be a truly effective team.  Before this meeting I would like you all to review the following organisational documents which can be accessed via the Staff intranet site. .   * Position description – Wellness Practitioners (and Operations Manager) * Tranquillity’s Code of Ethics * Tranquillity’s Strategic Plan   I would also like you all to take some time to think about how your role relates to Tranquillity’s broader goals and plans. During the meeting we will discuss our thoughts and develop a charter that documents our team’s specific roles, responsibilities and accountabilities.  Kind regards,  The Operations Manager |

Read the meeting minutes below and answer the next question.

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| **Tranquillity Wellness Centre**  **Strategic Plan**   |  |  |  |  | | --- | --- | --- | --- | | **Date:** | 09/01/2023 | **Purpose:** | Develop a team charter | | **Time:** | 10 am | **Chairperson:** | Operations Manager | | **Location:** | conference room | **Minutes:** | Sally Smith |     **Call to Order**  The meeting was held on the 09/01/2023 to prepare a team charter for the team of wellness practitioners.  **Attendees**  Sally Smith  Jim Carpenter  Elisabeth Reynolds  Jo Jones  Tim Mathers  Operations Manager  **Apologies**  None  **Reading of the Agenda**  **Topic Presenter Time**  Welcome Operations Manager 10:00  Introductions Operations Manager 10:02  *Main Motions*  Topic 1: Assign team member roles Operations Manager 10:05  Topic 2: Discuss responsibilities Operations Manager 10:20  Topic 3: Discuss accountabilities Operations Manager 10.40  **Main Motions**  **Topic 1: Assign Roles**  **Time:** 10:05  **Presenter:** Operations Manager  **Resolved: Assign team member roles**  Roles were assigned based on individual team member’s level of experience in the areas of:   * Naturopathy * Chiropractic * Osteopathy * Homeopathy * Acupuncture * Massage therapy * Meditation   **Sally Smith:** Naturopathy, Meditation  **Jim Carpenter:** Chiropractic, Acupuncture  **Elisabeth Reynolds:** Osteopathy, Homeopathy  **Jo Jones:** Massage therapy, Meditation  **Tim Mathers:** Naturopathy, Homeopathy  **Operations Manager:** Team management and leadership  **Topic 2: Discuss Team Member Responsibilities**  **Time:** 10:20  **Presenter:** Operations Manager  **Resolved:** Team members agree that their daily responsibilities will involve the following:   * Meet with clients * Examine patients * Perform a range of tests * Diagnose conditions and illnesses * Discuss treatment options * Design treatment plans * Keep accurate patient records * Some manual handling including manual handling of people * Other duties as required   **Topic 3: Accountabilities**  **Time:** 10:40  **Presenter:** Operations manager  **Motion:** Outline which team members are accountable for ensuring team members are meeting their responsibilities  **Resolved:** It was agreed and understood by all team members that the operations manager will be responsible for directing the team’s activities and will be accountable for ensuring all team members are meeting their goals. |

1.6 You must use this information to write an official team charter that will be signed by all team members. A template for this charter has been provided below. The ‘purpose’ section has been provided by the CEO.

You must complete the roles, responsibilities, and accountabilities sections of the charter based upon the information you have documented from the team meeting. You must also ensure that your team charter conforms to Tranquillity’s organisational goals and objectives. (Your total response should be approximately 150 words)

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| Example response below: | |
| **Team Charter** | |
| **Purpose** | Tranquillity’s wellness practitioners will provide clients with holistic solutions to their health and wellness needs by incorporating knowledge from a wide range of natural and alternative therapies. |
| **Roles** | **Sally Smith:** Naturopathy, Meditation  **Jim Carpenter:** Chiropractic, Acupuncture  **Elisabeth Reynolds:** Osteopathy, homeopathy  **Jo Jones:** Massage therapy, meditation  **Tim Mathers:** Naturopathy, Homeopathy  **Operations Manager:** Team management and leadership |
| **Responsibilities** | **Operations Manager:** Manage the team’s activities and provide support.  **Wellness Practitioners:** Though wellness practitioners have different specialties their collective responsibilities include:   * Meeting with clients * Examining patients * Performing a range of tests * Diagnosing conditions and illnesses * Discussing treatment options * Designing treatment plans * Keeping accurate patient records * Some manual handling including manual handling of people * Upselling of tranquilities line of wellness products. |
| **Accountabilities** | The operations manager will be responsible for directing the team’s activities and will be accountable for ensuring all team members are meeting their goals. |
| **Signed (by all team members)** |  |

1.7 Read the meeting minutes below and answer the next question.

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| |  |  |  |  | | --- | --- | --- | --- | | **Date:** | 09/01/2023 | **Purpose:** | Develop a team performance plan | | **Time:** | 10 am | **Chairperson:** | Operations Manager | | **Location:** | Conference room | **Minutes:** | Sally Smith |   **Call to Order**  The meeting was held on the 09/01/2023 to prepare a team performance plan for the team of wellness practitioners.  **Attendees**  Sally Smith  Jim Carpenter  Elisabeth Reynolds  Jo Jones  Tim Mathers  Operations Manager  **Apologies**  None  **Reading of the Agenda**  **Topic Presenter time**  Welcome Operations Manager 10:00  Introductions Operations Manager 10:00  Main Motions  Topic 1: Expected outcomes Operations Manager 10:15  Topic 2: Outputs Operations Manager 10:45  Topic 3: Goals Operations Manager 11.15  Topic 4: Expected outcomes Operations Manager 11:45  Topic 5: Outputs Operations Manager 12:15  **Key Resolutions**  **Topic 1: Expected outcomes**  **Time:** 10:15  **Presenter:** Operations Manager  **Resolved: Expected outcomes**  Tranquility’s wellness practitioners will provide clients with holistic solutions to their health and wellness needs by incorporating knowledge from a wide range of natural and alternative therapies including:   * Naturopathy * Chiropractic * Osteopathy * Homeopathy * Acupuncture * Massage therapy * Meditation   **Topic 2: Outputs**  **Time:** 10:45  **Presenter:** Operations Manager  **Resolved:** Team members agree on the expected outputs of the team  Team members are expected to perform the following roes as included in their position description:   * Meet with clients * Examine patients * Perform a range of tests * Diagnose conditions and illnesses * Discuss treatment options * Design treatment plans * Keep accurate patient records * Some manual handling including manual handling of people * Other duties as required   In addition to this team members are expected to behave in a manner which encourages teamwork and collaboration. Team members must also at all times act professionally toward each other, to employees external to the team of wellness practitioners and to customers.  **Topic 3: Goals**  **Time:** 11:15  **Presenter:** Operations manager  **Resolved:** Team members agree on the following team goals   * Maintain an employee satisfaction rate of over 85% for the next 12 months. * Each team member must see a minimum of six customers per day (if the centre is fully booked). * Team members must engage in ‘upselling’ of the centre’s range of wellbeing products. It is expected that the team achieve a collective sales target of $30000 over a six-month period   **Topic 4: Key performance indicators**  **Time:** 11:45  **Presenter:** Operations manager  **Resolved:** Team members agree to the following key performance indicators:   * Customer satisfaction will be measured with customer satisfaction surveys to be conducted every six months. If this customer satisfaction rate falls below 85% this key performance indicator will not be being met. * The number of clients seen collectively by the team will be monitored. It is expected that on average each team member will see at least six customers per day. If this average falls below this figure, then this key performance indicator will not be being met. * All team members are expected to engage in ‘upselling’ our range of wellness products. It is expected that the team should collectively sell $30000 worth of these products in a six-month period. If this sales figure falls below this amount this key performance criteria will not be being met.   **Topic 5: Support required**  **Time:** 12:15  **Presenter:** Operations manager  **Resolved:** Team members will be offered support n their role by both the operations manager and senior management in the areas of:   * Explaining or clarifying policies, procedures, instructions * Assisting with solving problems * Providing encouragement and recognise team members achievements in order to foster a positive attitude * Providing feedback * Ensure team members have the resources they need to perform their role |

You also want to develop a team performance plan for your team of wellness practitioners, so you conducted a team performance plan meeting. You must use the information from these minutes to complete the Team Performance Plan below. (Your total response should be approximately 250 words)

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| Example response below: | |
| **Team Performance Plan** | |
| **Expected outcomes** | Tranquillity’s wellness practitioners will provide clients with holistic solutions to their health and wellness needs by incorporating knowledge from a wide range of natural and alternative therapies including**:**   * Naturopathy * Chiropractic * Osteopathy * Homeopathy * Acupuncture * Massage therapy * Meditation |
| **Outputs** | Team members are expected to perform the following roes as included in their position description:   * Meet with clients * Examine patients * Perform a range of tests * Diagnose conditions and illnesses * Discuss treatment options * Design treatment plans * Keep accurate patient records * Some manual handling including manual handling of people * Other duties as required   In addition to this team members are expected to behave in a manner which encourages teamwork and collaboration. Team members must also at all times act professionally toward each other, to employees external to the team of wellness practitioners and to customers. |
| **Goals** | * Maintain an employee satisfaction rate of over 85% for the next 12 months. * Each team member must see a minimum of six customers per day (if the centre is fully booked). * Team members must engage in ‘upselling’ of the centre’s range of wellbeing products. It is expected that the team achieve a collective sales target of $30000 over a six-month period |
| **Key performance indicators (KPI’s)** | * Customer satisfaction will be measured with customer satisfaction surveys to be conducted every six months. If this customer satisfaction rate falls below 85% this key performance indicator will not be being met. * The number of clients seen collectively by the team will be monitored. It is expected that on average each team member will see at least six customers per day. If this average falls below this figure, then this key performance indicator will not be being met. * All team members are expected to engage in ‘upselling’ our range of wellness products. It is expected that the team should collectively sell $30000 worth of these products in a six-month period. If this sales figure falls below this amount this key performance criteria will not be being met. |
| **Support required** | * Explaining or clarifying policies, procedures, instructions * Assisting with solving problems * Providing encouragement and recognise team members achievements in order to foster a positive attitude * Providing feedback * Ensure team members have the resources they need to perform their role |
| **Signed:** (signed by all team members) | |

1.8 As the Operations Manager, outline five (5) strategies, policies, or procedures you plan on implementing to help ensure that all team members are supported to take responsibility for their work to meet both their own and the team’s objectives. (Your response should be approximately 60 words)

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| Student’s response must demonstrate an understanding of at least two appropriate strategies / policies/ procedures that the Operations Manager could implement to help ensure that all team members are supported to take responsibility for their work to meet both their own and the team’s objectives.  Responses may include, but are not limited to, reference to:   * Develop individual performance plans and regularly monitor performance, KPIs, outcomes in order to ensure each individual is meeting expectations. * Identifying underperformance and discussing with individual to resolve issue. * Providing training if skills/knowledge gaps are identified * Explaining or clarifying policies, procedures, instructions * Providing encouragement and recognise team members achievements in order to foster a positive attitude * Providing feedback * Ensure team members have the resources they need to perform their role * Developing appropriate policies, e.g., that at the Operations Manager I will engage in monthly feedback / performance review meetings with each team member. * Facilitating open communication through regular team meetings, suggestion boxes, one-on-one meetings, etc., so individuals could raise concerns and then ensure that I adequately deal with any issues. * Reward good performance by clear, specific feedback in team meetings   Other logical responses are acceptable.  Students are expected to apply knowledge learned from the first two sections of the Study Guide to the Tranquillity scenario. |

Section 2

Developing and Facilitating Team Cohesion

Ensuring Team Input

2.1 Imagine you are the team leader of a group of rehabilitation therapists, e.g., speech pathologists and physiotherapists. You notice the team members rarely provide any input during team meetings.

Outline two (2) methods you can implement to gather the team’s input into planning, decision making, and the operational aspects of the team’s activities. (Your response should be approximately 50 words)

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| Student’s response must demonstrate an understanding of two appropriate strategies to facilitate team input into planning, decision making and operational aspects of teamwork.  Responses may include, but are not limited to, reference to:   * **Regular team meetings:** Encourage team input/discussion/feedback during team meetings by including it in each agenda. * **Regular one-on-one communication:** Regularly communicate with team and encourage team to come to manager with ideas/issues any time. * **Employee surveys:** Ask employees to complete a survey (may be anonymous to ensure honesty. Survey can be tailored to gather feedback/input on specific areas. * **Suggestion boxes:** Have a suggestion box available and reviewed regularly and encourage employees to submit suggestions. |

Promoting Team Members’ Accountability

2.2 Part of a manager’s role is to ensure that individual team members take responsibility for their own work and assist others where possible. Imagine you are a practice manager of an allied health centre and answer the following questions.

a) Briefly outline what a team responsibility matrix is and how it can be used to help ensure that your team members are aware of both their own and other team member’s roles and responsibilities. (Your response should be approximately 60 words)

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| Student’s response must demonstrate an understanding of what a team responsibility matrix is how it can be used to assist team members to take responsibility for their own role/responsibility and understand teammate’s roles/responsibilities.  Example response:  A team responsibility matrix is a tool which helps to communicate to team members what they are responsible for. It also shows who else on the team is responsible for, accountable, consulted and informed about individual team member’s progress and the team’s progress as a whole. By developing this matrix, everyone on the team can be clearly informed about both their own and other’s roles/responsibilities. |

b) Recently, you notice a team member, Kelly, is not taking responsibility for their work. As a practice manager, what steps would you take to resolve this situation? (Your response should be approximately 80 words)

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| Student’s response must demonstrate an understanding of an appropriate process for a manager to follow when a team member is not taking responsibility for their work.  Response should include some variation of:   * Talk to the team member to find out if there are any specific circumstances that are contributing to the issue. * Ensure that the team member has adequate resources to perform their role/responsibilities * Re-communicate role, responsibilities, objectives * Help team member re-engage with their role by helping them understand importance to organisational objectives * Help team member take control by helping break tasks down if they are feeling overwhelmed * Provide praise / positive feedback when they do take responsibility. |

c) After attending a seminar, you learned that it is important that team members assist one another to undertake their required roles and responsibilities to improve team performance. Outline an example of one (1) team policy that you could implement to encourage your team members to do so. (Your response should be approximately 30 words)

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| Student’s response must demonstrate an ability to develop an appropriate team policy that ensures individuals within the team assist one another undertake required work role and responsibilities.  Individual responses. Examples include, but are not limited to:   * All new team member’s will be ‘buddied up’ with a senior team member throughout the probation period. * Once a team member has completed their assigned tasks they should tell the manager so the manager can assign them to complete other team tasks that have yet to be finalised. * All team members must provide relevant information/resources to their teammates as it becomes available. |

Providing Feedback to Encourage and Reward Team and Team Members

2.3 Providing positive feedback can help encourage, value, and reward both individual and team efforts and contributions, leading to improved team effectiveness.

a) Provide two (2) reasons why it is important for a manager to be both consistent and specific when providing positive feedback to team members. (Your response should be approximately 50 words)

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| Student’s response must demonstrate understanding of importance of consistency and specificity in providing effective feedback.  Responses may include, but are not limited to, reference to:   * It is important to be consistent because it establishes an environment in which employees know efforts and contributions are going to be recognised and rewarded on an ongoing basis. * It is important to be consistent because if you aren’t employees will not know where you stand or the importance of their efforts/contributions. * It is important to be specific so that everyone is aware of what efforts/ contributions/behaviours are rewarded so that they can emulate them. * It is important to be specific so that everyone is aware that you are paying attention. |

b) One of the commonly used strategies is for managers to strike a balance between rewarding individual team members and the team as a whole when providing positive feedback/rewards. Briefly outline what this is so. Your response should be approximately 60 words)

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| Responses will vary but must demonstrate an understanding of problems and benefits associated with providing rewards to team members individually and the team as a whole.  Focusing on individual incentives can have the undesired effect of fostering internal competition and encouraging employees to work purely for their own gain, rather than working on the overall goals of the team. However, if organisations focus too heavily on rewarding teams rather than the individual it can result in top performers feeling undervalued and underperformers being overvalued. |

2.4 Imagine you are the practice manager from Question 2.2. A few months later, the team member who was not taking accountability improved their work performance and received good reviews from their patients. Not only that, but Kelly’s team has also improved their performance compared to three months ago. The practice director is impressed with their performance and has provided a budget of $500 for you to spend as you see fit as a reward to the team.

Briefly explain how you will utilise this reward to provide positive feedback, and why you have chosen these methods. Hint: you should mention whether you will use the money for individual or team rewards. (Your response should be approximately 40 words)

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| Student’s response must demonstrate the ability to provide feedback to team members.  Student’s response can be individual reward, team reward, or both, as long as a logical explanation is provided.  Responses may include, but are not limited to, reference to:   * Individual reward: recognise individual effort and encourage further improvement * Team reward: no unhealthy competition between team members and encourage team bonding and team cohesion. * I will also provide feedback to all team in a team meeting, memo, and email, and being explicit about the behaviours being rewarded. This is to make sure that all team members are aware of the rewarded behaviour * I will also discuss with the relevant team members who will be rewarded and how they wish the spend the $500 in a team meeting. The activity chosen needs to be valued and agreed upon by at least the majority of the team. |

Ensuring Issues Raised by Team Members are Recognised and Addressed

2.5 You recently started your role as an operations manager in a medical practice that was only set up a month ago. One of your roles is to ensure that any concerns, issues, or problems identified by team members are recognised and addressed. However, you notice that there is no procedure established to facilitate this process.

Outline a three-step process that can be used by leaders and managers when one of the team members raises an issue or concern, such that it can be addressed effectively. (Your response should be approximately 70 words)

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| Student’s response must demonstrate an understanding of an appropriate three step process that can be used by managers to help address issues/concerns raised by the team.  It is expected that students will provide a process that reflects:   1. Record and assess the issue or concern – e.g., document the issue and assess its importance/what it relates to. 2. Attempt to resolve the issue – e.g., if issue can be addressed at management level, then either fix it/implement change or discuss with team member why change cannot be made. 3. If the issue cannot be resolved, refer the issue to senior management/HR – refer serious issues to senior management or human resources department.   Other, logical responses are acceptable at marker’s discretion. |

Integrating Your Knowledge

Refer to the information from Section 1’s *Integrating Your Knowledge* section when answering the following questions.

2.6 Using the team charter you developed in Question 1.6, develop a team responsibility assignment matrix in the template below.

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| --- | --- | --- | --- | --- | --- | --- | --- |
| Responses will vary but must reflect the breakdown of duties developed in the team charter. For example, the operations manager may be both informed and accountable.  Example response: | | | | | | | |
| **Responsibility Assignment Matrix** | | | | | | | |
| **R-Responsible A-Accountable I-Informed** | | | | | | | |
|  | **Sally Smith** | **Jim Carpenter** | **Elisabeth Reynolds** | **Jo Jones** | **Tim Mathers** | **Operations Manager** | **CEO** |
| **Massage** |  |  |  | R |  | A | I |
| **Meditation** | R |  |  | R |  | A | I |
| **Acupuncture** |  | R |  |  |  | A | I |
| **Naturopathy** | R |  |  |  | R | A | I |
| **Chiropractic** |  | R |  |  |  | A | I |
| **Osteopathy** |  |  | R |  |  | A | I |
| **Homeopathy** |  |  | R |  | R | A | I |

Section 3

Facilitating Teamwork

Encouraging Team Member Participation

3.1 Identify three (3) techniques that a leader or a manager can use to facilitate teamwork. (Your response should be approximately 25 words)

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| Student’s response must demonstrate an understanding of three techniques that a leader can use to help facilitate the team to raise issues.  Responses may include, but are not limited to:   * Build diverse and inclusive teams * Clearly define roles and responsibilities for every team member * Build trust within the team * Encourage clear, frequent communication * Manage team meetings wisely * Team members are allowed autonomy in decision-making * Provide the team with learning opportunities * Not afraid to reorganise team dynamics |

3.2 One way to encourage team members to be involved in team activities is for them to be aware of the importance of participation and teamwork. Outline two (2) things a leader can do to encourage this. (Your response should be approximately 60 words)

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| Student’s response must demonstrate an understanding how to encourage team members to understand the importance of participation and teamwork.  Responses may include, but are not limited to:   * Encouraging active listening. Managers should encourage team members to engage in active listening when others are sharing their opinions and thoughts. Team members should be encouraged to pay attention to what others are saying, not interrupt, and provide their considered response only after hearing and absorbing other team member’s opinions. * Leading by example. Managers should themselves remain open to suggestions and concerns from team members by actively listening and providing authentic feedback. * Delegating problem solving tasks to the team. A great way to encourage participation is to delegate team members to work together to achieve a solution. While this is being done, the manager can monitor the process and provide support where necessary. This can foster the team members’ sense of responsibility and ownership of the team’s output. * Encouraging team members to share information. Emphasise to team members the importance of their individual role and how it combines with other team member’s work to achieve the team’s goals. * Encouraging trust and cooperation between team members. The relationships team members develop between themselves are as important as their relationship with their manager. It is important to pay close attention to how team members are working together and take steps to improve communication, trust, and respect in those relationships. |

Developing Team Norms

3.3 The development of team norms can assist managers in facilitating a culture of effective team communication and performance. Briefly explain the steps that an effective manager can take to develop team norms. (Your response should be approximately 200 words)

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| Student’s response must demonstrate an understanding of how a manager can develop team norms.  It is expected that students will make some reference to the following steps from Section 3, under **Developing Team Norms**:   1. Identify successful norms based on your past experience. Think back to a team where things worked well and then identify one to three norms that contributed to that success. 2. Break down the norms into behaviors. Once you have an abstract list of norms, turn them into measurable behaviors. 3. Commit to five norms or fewer. Prioritize what you want to tackle first. It’s OK to start with just one norm, but don’t take on more than five at once. Focusing on fewer norms increases your chances of remembering them and practicing them regularly. 4. Create a recurring plan. Too often executive teams spend time at an offsite coming up with well-crafted norms, only to fail to transfer them to the boardroom on Monday morning. 5. Create a system of mutual accountability. Discuss how you will hold each other accountable if you don’t practice the norms you’ve agreed to. What will you do if, after repeated check-ins, there’s still no progress? What will you do if all but one of you follows through? What are other scenarios where things can stall or go off the rails, and how will you have the conversation to hold each other accountable?   Note: Students do not need to refer to all of the above steps. Other, logical responses are acceptable at marker’s discretion. |

3.4 Reaching consensus within a team is important, especially when making decisions that require input from team members.

a) Outline the steps that are a leader can follow to gain consensus within a team. (Your response should be approximately 100 words)

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| Student’s response must demonstrate an understanding of the stages to gain consensus within a team.  Response may include, but not limited to:   * Introduce and clarify the issue – share background information * Open out the discussion – Make space for everyone to share their needs and opinions before launching into trying to solve the problem * Explore ideas in a broad discussion – explore pros and cons of different options, identify key concerns, needs, and objectives * Form a proposal – look for a solution that meets everyone’s most important needs * Amend the proposal – look for changes that will make the proposal even stronger * Test for agreement – clearly state the proposal and * Work out how to implement the decision |

b) Outline the steps a leader should take when a proposal is being rejected or blocked by many team members. (Your response should be approximately 40 words)

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| Student’s response must demonstrate an understanding of how to gain consensus within a team if the proposal is rejected.  Response may include, but not limited to:  The leader would need to go back a stage in the process and review the proposal and amend it further to make the proposal stronger and to gain consensus. The leader may also need to create a new proposal to gain consensus. |

Supporting the Team in Identifying Work Performance Problems

3.5 Imagine you are the practice manager for a wellness centre. One of your roles is improving the performance of a team. One effective method to help resolve team performance issues is to conduct a team performance discussion.

a) How would you discuss with your team to facilitate a performance improvement discussion? Outline four (4) questions that you could ask to start the discussion. (Your response should be approximately 40 words)

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| Student’s response must demonstrate an understanding of at least six appropriate questions managers can ask to facilitate a performance improvement discussion.  Responses may include, but are not limited to:   * What has not gone according to plan and why? * What is not on track and how the team will get back on track? * What can be done better? * What areas of performance require improvement? * What management can do to support improvement? * What follow-up will be required? |

b) You now wish to conduct a team performance improvement meeting. Outline the steps you would take to conduct this meeting. (Your response should be approximately 100 words)

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| Student’s response must demonstrate an understanding of appropriate steps that managers should use to conduct a team performance improvement meeting.  It is expected that student’s response will make reference to the six steps   * Step 1: Make it clear that it is the performance of the team that is being discussed * Step 2: Be specific * Step 3: Discuss why this presents a problem for the organisation * Step 4: Allow the team the opportunity to suggest how to resolve the issue * Step 5: Document the actions the team has agreed to take to resolve the issue in a team performance improvement plan * Step 6: Reach agreement on how progress against this plan will be monitored and get team members to sign the action plan   Note: other, logical responses are acceptable at the marker’s discretion. |

Being a Role Model for Team Members

3.6 Effective team leader should be good role models for their team members to improve team performance. Imagine you are the team leader for a group of physiotherapists and occupational therapists at a rehabilitation centre. Outline three (3) behaviours that you would model to improve team performance. (Your response should be approximately 40 words)

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| Student’s response must demonstrate an understanding of at least three behaviours that leaders should model that will increase team performance.  Responses may include, but are not limited to:   * Honesty – be truthful in all dealings * Confident – have confidence that you and the team will be successful and are ready to make decisions. * Open communication – open communication means there are less misunderstandings and issues on a team. * Trustworthiness – respect confidences, keep promises, and live up to commitments * Integrity – do the right thing * Fairness – do not play favourites * Consistency – deal with similar situations in the same way every time * Dependability – do what you say you will do * Organisation – be well prepared * Stability – keep mood level * Approachability – be available to stakeholders * Confidence – be confident and non-anxious * Positive attitude – be up-beat and optimistic * Strength – confront tough situations with courage and tenacity * Compassion – show respect and empathy for others * Pragmatism – be willing to deal with the reality of the situation and seek appropriate options * Follow own rules – do not have double standards |

Integrating Your Knowledge

Refer to the information from Sections 1 and 2’s *Integrating Your Knowledge* when answering the following questions.

3.7 You have noticed that Sally Smith, one of Tranquillity’s most popular, experienced, and long serving wellness practitioners, has become disengaged with other employees and her role in general. She has also been turning up late for work regularly and often calling in sick. You organise a one-on-one meeting with her and explain that she is a valuable member of the team and that you are concerned about these changes in her behaviour. In this meeting Sally explains that she is feeling overworked due to always being responsible for helping other wellness practitioners to resolve their work-related problems.

Sally goes on to explain that her passion is providing customers with the best guidance in meditation and naturopathy that she possibly can and that, while she enjoys training new staff, she feels overwhelmed with helping them deal with all of their work-related issues. Sally then, somewhat nervously, informs you that other practitioners find you unapproachable and that they do not feel comfortable coming to you with their work-related issues.

You thank Sally for her feedback and assure her that you will put processes in place to ensure that the other wellness practitioners are better able to raise concerns with you rather than raising their concerns with her.

a) What processes will you put in place to ensure that your team members feel comfortable raising workplace issues you and so that they feel confident that their issues will be addressed? Outline three (3) of these processes. (Your response should be approximately 60 words)

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| Student’s response must demonstrate an understanding of at least two processes that they could implement to enable the team to raise issues.  Responses may include, but are not limited to:   * Developing a policy that will be communicated to the team in a team meeting and added to the policies and procedures manual that all employee issues should be raised with me and that I will address them or refer them onto senior management if required (and that staff will be advised of the outcome). * Implement ongoing opportunities to allow staff to raise issues: * An open door policy – e.g. making themselves available and accessible for team members to raise issues/discuss problems at any time. * Suggestion boxes – e.g., allowing team members to communicate issues anonymously * Team meetings/tool box meetings – e.g., asking team members to discuss issues/concerns during a team meeting. * Formal reporting processes – e.g., having a formal process that employees can follow to report serious issues. |

b) After hearing Sally’s feedback, you reflected on your own actions and performance, especially around team members. You realise you are not entirely open to the feedback and input from your team members. For instance, when a team member provides a suggestion or feedback, you tend to find fault in it and criticise it instead of being open and listen to their input. Further, you do not communicate in an effective manner – you tend to only communicate bits and pieces information instead of the full picture. This often confuses your team member and do not understand what you are trying to communicate, and thus leads to ineffective communication and poor team performance.

Briefly outline one (1) thing you could practice to model desired behaviour as well as to promote team performance. (Your response should be approximately 60 words)

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| Student’s response must demonstrate appropriate steps/actions to ensure that they serve as a role-model and enhance open communication processes in Tranquillity.  Responses may include, but are not limited to, reference to:   * Be open-minded. It is important to listen and try to understand every suggestion or input given to me by the team members. It is important to listen to others and consider whether I’m in the wrong or can improve on what I’m saying and doing. However, I need to understand not to take every suggestion serious as it may not be possible to fulfil every suggestion. * Be an effective communicator. It is important to be able to convey ideas and information in a clear and succinct manner so that team members can understand the information I’m trying to put across without feeling lost or overwhelmed. I should also learn to listen more or to check in regularly to make sure that the team members are following. |

3.8 You also reflect that there are some communication problems within your team. You have seen instances of team members not communicating clearly with each other when they are working on the same task and taking too long to respond to each other’s enquiries, which impacts operational efficiency. You want to encourage all team members to take more responsibility for communication processes within the team so you think it would be a good idea to develop some team norms concerning inter-staff communication.

While you intend to finalise these norms after consultation with the team, you would want to suggest some team norms to the team in order to increase inter-staff communication effectiveness. Outline three (3) of these norms. (Your response should be approximately 120 words)

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| Responses will vary but must be appropriate communication norms that would facilitate the effectiveness of inter-staff communication.  Example response:   * It is expected that team members will utilise email often throughout the work day. All email communication related to the team activities should be conducted using their organisational email address. * Any communication sent between team members requiring a response must be replied to within 24 hours of the message being received. Note this does not mean that any call to action included in the email must be completed, however a response confirming message receipt and understanding is required within this 24-hour time period. * Any communication with members of the organisation who are external to the team must be conducted applying the same rules of communication contained in this document.   Other logical norms. |

Section 4

Liaising with Stakeholders

Communication with Stakeholders

4.1 Managers need to establish and maintain open communication processes with all stakeholders. One way to ensure this is achieved effectively is to develop a stakeholder communications plan. Imagine you are the operations manager of a newly established wellness centre. Briefly outline the steps you should take to develop a stakeholder communications plan. (Your response should be approximately 180 words)

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| Student’s response must demonstrate an understanding of the process involved in developing a stakeholder communications plan.  It is expected that students will make reference to some variation of the following steps covered in Section 4 under **Developing a stakeholder communications plan.**   * Identify stakeholders. The stakeholders requiring ongoing communication will usually need to be determined in consultation with senior management. These stakeholders will be critical to the ongoing success of the team’s activities. These may include people or teams external to the organisation like project sponsors and suppliers. * Determine stakeholder expectations. If the expectations of all stakeholders are not made clear to the team manager before the communication plan is developed, the team manager will need to consult with these stakeholders to determine their communication needs. * Determine stakeholder priority. The next step is to determine how important each stakeholder is to the team’s activities. This will depend on how critical the stakeholder is to the team’s activities. Stakeholder priority will likely be decided in consultation with senior management and the stakeholders themselves. * Determine communication methods and frequency of communication. Once the stakeholders and their expectations have been identified and their priority determined, the means of communicating with them must be determined. Communication methods will need to be developed that provide stakeholders with information relevant, timely and suited to their expectations. |

Communicating Information from Management to Team

4.2 A team manager is also often responsible for communicating information from senior management to their team. Outline two (2) critical considerations that team managers should keep in mind during this process. (Your response should be approximately 40 words)

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| Student’s response must demonstrate an understanding of key considerations involved in effectively communicating information from senior management to the team.  Responses may include, but are not limited to, reference to:   * Adjust information to match the team member’s needs – e.g., only provide information in the form that is easy and accessible for the team to understand. * Keep a record of what is communicated and when so there is proof information was communicated * Provide team members with a record of what was communicated – e.g. amended policy/procedure, meeting minutes, etc. * Decide upon most appropriate method of method of communication based upon information (e.g., team meeting, one-on-one meeting, email, visual aid, etc. |

Communicating Team Issues to Management

4.3 As a team manager at the Be Well Recovery Centre, one of your responsibilities is to communicate problems and issues raised by your team to senior management. Last week, one of your team members, Jasper, raised a concern with you regarding his performance bonus. Part of his role as a physiotherapist at the centre, Jasper sells physiotherapy product to his clients, which contributes to his month-end performance bonus. Jasper pointed out that he finds it stressful and distasteful that he needs to “hard sell” products to his client, otherwise his income would be affected. He asked whether it was possible to remove this responsibility and increase his hourly wages instead. He also mentioned that other team members also discussed about this concern in a few different occasions.

a) As this is an organisational policy, you cannot address or resolve this issue at your level, and has to be brought up to the senior management team. Outline two (2) methods that you will adopt to raise Jasper’s concerns with the senior management. (Your response should be approximately 70 words)

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| Responses will vary but should include some combination of the methods of upward communication outlined in Section 4 of the Study Guide.  Responses should also make reference to the importance of following up with management after this communicating has taken place.  An example response is provided below:  I would outline the concern raised by Jasper in an email and send it to the senior management team and set up a meeting with them to discuss this matter. I would also follow this up by request a one-on-one meeting with the practice director to discuss how this feedback will be addressed and whether they plan to incorporate this suggestion into decision making or to update the organisational policy. |

b) If your team raises an issue that cannot be resolved at your level, what steps should you take? (Your response should be approximately 50 words)

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| Student’s response must demonstrate an understanding of the process involved in communicating unresolved issues raised by team members to senior management.  Responses may include, but are not limited to, reference to:   * Communicate issue to upper management via the most effective method based on the issue (e.g., management meeting, one-on-one meeting, email, etc.) * Follow-up to ensure issue is dealt with instead of only conveying the information. * Inform team of the outcome, even if the issue is not able to be resolved by senior management, and the reason why the issue cannot be resolved. This can be done during regular meetings or discussed one-on-one basis. |

Managing Stakeholder Concerns

4.4 Imagine you are working as an assistant practice manager at a local medical practice and answer the following questions.

a) Recently, your supervisor informed you that they observed some communication issues within the team and tasked you to resolve the issue. You decide to develop a corrective action plan to resolve the issue and improve team performance. You intend to do so by having a planning session with your team. Provide three (3) questions you should consider to facilitate the planning session. (Your response should be approximately 30 words)

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| Responses will vary but must demonstrate the ability to evaluate the issue brought up by management by using the 4 Ws and 2 Hs questions.  Example response:   * What should be done to correct the issue? * Who should be responsible for implementing these corrective actions? * When and how often should the corrective actions be carried out? * Where should the corrective action documentation take place? * How can we make sure that these corrective actions prevent recurrence? |

b) As the assistant practice manager, outline the steps that you could take to address and resolve the issues and concerns raised by stakeholders. (Your response should be approximately 200 words)

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| Responses will vary but must demonstrate the ability to evaluate the issue brought up by management.  Example response:   * Define the problem – it is always important to first identify and define the problem as well as the desired outcome. * Establish the scope of the problem – understanding the severity of the issue and how it will affect the organisation. * Take containment actions – the process to resolve the root cause of the issue takes time. Therefore, containment issues should be implemented to address any pressing problems to prevent further issue. * Find the root cause of the problem – at this stage, you must be cautious that the root cause of the problem is not just surface-level issue. * Plan corrective actions to fix the root cause – create a plan to address the root cause. Create SMART goals and assign feasible due date as well as included the stakeholders involved and their specific roles.. * Implement the corrective action plan – be thorough and cautious with every aspect of the implementation of the action plan. * Follow up to ensure the plan worked – schedule a final debrief to inform the team about any changes to operations or workflows. Follow up an appropriate time to check the corrective action plan resolved the problem |

Integrating Your Knowledge

Refer to the information from Sections 1, 2, and 3’s *Integrating Your Knowledge* when answering the following questions.

4.5 The CEO has informed you that she is considering extending the opening hours of the centre from 9am-5pm to 9am-9pm on weekdays. This would necessitate a change in the shift arrangements for your team as well as various other operational changes. The CEO has asked you to obtain feedback from your team about their thoughts on this potential change and what issues they foresee.

The team is composed of both extroverted and introverted practitioners. They also have varying lifestyles and personal commitments outside of work. Some work on a full-time basis for the centre and others work part-time.

Outline two (2) methods you will use to gather feedback from the team and explain why you have used these methods in this situation. (Your response should be approximately 150 words)

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| Student’s response must demonstrate an understanding of two appropriate strategies that can be used to gather feedback/input in this situation and why their strategies are appropriate.  Responses will vary. Example response:   * I would discuss the possibility of this change during a team meeting and state that management were seeking feedback. I would distribute an employee survey that asks team members about their availability and their thoughts on this change in operations and tell the team to complete it over the next week and return it to me. This would help ensure that team members were thinking about the impact of these changes. * I would use a suggestion box that team members can use to provide information confidentially at any time. This would allow team members who were introverted or who did not feel comfortable providing feedback in a face-to-face manner to provide their detailed feedback. * A week later I would also conduct a team brainstorming meeting to get their opinions. I would make sure that this was conducted at a time when everyone was available. I would also make sure everyone was aware of the purpose of the meeting in advance and were prepared for the discussion. I would also encourage team members to approach me at any time after the meeting if they had additional feedback. * Finally, I would meet with team member’s on a one-on-one basis to discuss any specific concerns that they had. * I believe that using a variety of methods over time will enable me to seek appropriate feedback from all team members. |

4.6 After consultation with employees, Tranquillity successfully extended its operating hours. It has now been three months since the opening hours were extended and you have been very pleased with the effort and enthusiasm that your team has demonstrated. You would like to reward the team and show your appreciation for their contribution. The CEO has provided a budget of $1, 000 for you to spend as you see fit to reward the team. Explain two (2) methods about how you will reward the team and provide them with positive feedback and why you have chosen these methods. (Your response should be approximately 100 words)

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| Student’s response must demonstrate an understanding of how to provide appropriate feedback to the team that encourages, values, and rewards their efforts.  Responses may include, but are not limited to, reference to:   * Providing feedback to all team in a team meeting, memo, email and being explicit about the behaviours being rewarded. This is done to ensure all team members are aware of the behaviour that is being appreciated/rewarded. * Involve staff in discussion about how to spend $1,000 in a team meeting – get their input on how to reward team / suggestions on team rewards, e.g. a team dinner, team activity, etc. I would seek input from the team to make sure that the team activity chosen is valued by at least the majority of the team. * Personally recognise key individuals that have been performing well as well as the team as a whole so that both the individuals and the team feel appreciated. * Other logical responses are also acceptable. |

4.7 You also want to make sure that you establish and maintain open communication processes with all stakeholders. To do this you decide to develop a stakeholder communications plan. Document your plan in the template below. Hint: see section 4 for more information on how to develop a stakeholder communications plan.

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Expectations** | **Priority** | **Communication Methods and frequency** |
| **Wellness Practitioners** | Job role expectations  Support when necessary from management | 1 | Weekly team meetings  Weekly email outlining team meeting |
| **Operations Manager** | Job role expectations  Support from senior management when necessary | 1 | Weekly team meetings  Weekly management meetings  Email as necessary |
| **CEO** | Continual update of team activities and any serious issues and concerns raised by the team | 1 | Weekly management meetings  Weekly email from Operations Manager outlining the teams activities |
| **Human Resources Manager** | Must be informed of any serious issues and concerns raised by team members relating to their role | 2 | Weekly management meetings  Email as necessary |
| **Clients** | Information regarding any sales promotions | 2 | Monthly bulk email  Marketing materials send by post on a monthly basis |

4.8 Imagine that it has now been one year since you developed your team’s performance plan. The CEO has sent you an email outlining how one of the team’s key performance indicators is not being met (see below).

|  |
| --- |
| **Email from CEO**  Dear Operations Manager,  In reviewing sales results for our line of personal wellness products, it has come to my attention that sales in these products have declined by 25% over the past six months. While approximately 10% of these products are purchased by clients in the reception area while they are waiting for appointments, 90% of these sales are made as a result of practitioners ‘upselling’ appropriate products to clients during their appointments. That is why one of the KPI’s of your team of wellness practitioners is to collectively sell $30000 of this line of products over a six month period.  Although the level of sales achieved by each team member is recorded individually, the figures show that the practitioners are selling approximately the same amount of products as each other. This means that this decrease in sales is not due to some team members selling less than others. It appears that the team as a whole is not reaching this target.  I would like you to meet with your team and discuss this aspect of the team performance plan that was developed six months ago. I would like you to seek their opinions as to why this decrease in sales has occurred and in consultation with the team try to determine how their performance in this area can be improved.  Once this has been done I would like you to develop a team performance improvement plan outlining what both the team of wellness practitioners can do to resolve this performance issue as well as any support that can be provided by management. To assist them in reaching this key performance indicator in the future.  Kind regards,  The CEO |

a) You intend to facilitate a performance improvement discussion with your team to address this issue. To prepare for this meeting you decide to draft a gap analysis. Only complete the two sections titled ‘current situation’ and the ‘desired situation’. Leave the section called ‘the gap’ empty as this will be discussed in the team performance meeting. (Your total response should be approximately 120 words)

|  |  |  |
| --- | --- | --- |
| **Current Situation**  **Where are we now?** | **The Gap**  **How will we get there?** | **Desired Situation**  **Where do we want to be?** |
| We are not meeting our key performance criteria requiring our team to sell $30000 worth of wellbeing products over a six month period.  The figure is down 25% meaning we need to increase sales by $7500 over the next six month period. | (Leave this space empty) | We need to reach out key performance indicator as outlined in our team performance plan. This KPI is outlined below.  All team members are expected to engage in ‘upselling’ our range of wellness products. It is expected that the team should collectively sell $30000 worth of these products in a six month period. If this sales figure falls below this amount this key performance criteria will not be being met. |

b) You have had a team performance meeting and made a record of the team’s suggestions as to how they can improve performance and meet their KPI regarding sales of wellness products (meeting minutes are shown below).

|  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| |  |  |  |  | | --- | --- | --- | --- | | **Date:** | 20/01/2023 | **Purpose:** | Discuss failure to reach KPI | | **Time:** | 10 am | **Chairperson:** | Operations Manager | | **Location:** | conference room | **Minutes:** | Sally Smith |   **Call to Order**  The meeting was held on the 20/01/2023 to discuss how the team can improve its performance in relating to the following key performance indicator:  All team members are expected to engage in ‘upselling’ our range of wellness products. It is expected that the team should collectively sell $30, 000 worth of these products in a six-month period. If this sales figure falls below this amount this key performance criteria will not be being met.  **Attendees**  Sally Smith  Jim Carpenter  Elisabeth Reynolds  Jo Jones  Tim Mathers  Operations Manager  **Apologies**  None    **Main topics of discussion**  Topic 1: What hasn’t gone to plan and why?  Topic 2: What can the team do better to achieve this KPI?  Topic 3: What support can be provided by management to assist the team?  **Main motions**  **Topic 1: WHAT HASN’T GONE TO PLAN AND WHY?**  **Time:** 10:15  **Presenter:** Operations Manager  **Resolved: What hasn’t gone to plan and why?**  There has been a drop in sales of tranquilities wellness products by 25% over the past six months. The team’s collective sales target is $30000 over a six month period. We have fallen short of this figure by $7500.  The team’s suggestions as to why this has occurred are as follows:   * The line of products are more expensive then similar products offered a new pharmacy warehouse which has opened locally. * The line of products is outdated and these products are not as popular as they have been in the past. * There is no incentive for practitioners to upsell these products except that they must meet this collective team KPI * The current display units for the products are made of cardboard and don’t present the products in a very attractive way.   **Topic 2: What can the team do better to achieve this KPI?**  **Time:** 11:45  **Presenter:** Operations Manager  **Resolved:** What can the team do better to achieve this KPI?  The team’s suggestions as to what they can do better to achieve this KPI are as follows:   * Make every client aware of the line of products. Team members admit they often don’t often recommend the line of wellness products to clients. * Ensure the line of products are always fully stocked, and are kept neatly displayed.   **Topic 3: What support can be provided by management?**  **Time:** 12:15  **Presenter:** Operations manager  **Resolved:** What support can be provided by management to assist the team in meeting this KPI?  The team’s suggestions as to what management can do better to assist the team achieve this KPI are as follows:   * Provide team members with a financial incentive where they receive 10% of the sales price of each item they upsell to clients. * Update the line of wellness products to ensure they are competitive with other products on the market. * Provide a more attractive display unit in which the line wellness products are displayed. |

Using this information, complete the following team performance improvement plan. (Your total response should be approximately 70 words)

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| **Team Performance Improvement Plan** | |
| Performance improvement period: 20/01/2023 to 20/06/2023 | |
| Performance will be reviewed on: 20/06/2023 | |
| **Team member responsibilities** | **Management responsibilities** |
| 1. Ensure every client is aware of the line of wellness products  2. Make a greater effort to upsell these products to clients  3. Ensure the product display case is always stocked, clean and presentable. | 1. Provide a financial incentive of 10% of sales that individual team members make.  2. Update the line of wellness products  3. Provide a better display case for the line of products. |

4.9 The CEO and Human Resources Manager have decided that the team of wellness practitioners would benefit from undertaking a minimum of 40 hours of professional development per year. This professional development would be in the form of online certificates or face-to-face courses to be completed at the company’s expense. These courses would, however, need to be completed in team member’s own time outside of work hours. The CEO has asked you to inform your team about this requirement.

a) Outline three (3) methods that you will implement to provide the team with this information. Then, explain why you have chosen these methods. (Your response should be approximately 70 words)

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| Responses will vary but should include some combination of the methods of downward communication outlined in Section 4 of the Study Guide.  Responses should also make reference too keeping a record of what has been communicated and providing team members with this record of communication. An example response is provided below:  First I would write an email to the team outlining this new requirement. This ensures that there is a record made of this communication. I would also conduct a team meeting to discuss this new requirement. I would also place a poster somewhere in the workplace reminding the team of their professional development requirements. |

b) After communicating this professional development requirement to the team, they raise a few concerns. While many of the staff members are pleased to have the opportunity to complete certificates at the company’s expense, most are concerned about the requirement to complete 40 hours of professional development outside of work hours. As team manager, it is your responsibility to provide the CEO and Human Resources Manager with this feedback.

Outline two (2) methods that you will implement to provide this team feedback to the CEO and the Human Resources Manager. Then, explain why you have chosen these methods. (Your response should be approximately 50 words)

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| Responses will vary but should include some combination of the methods of upward communication outlined in Section 4 of the Study Guide.  Responses should also make reference to the importance of following up with management after this communicating has taken place.  An example response is provided below:  I would outline the feedback received from the team of wellness practitioners in an email and send it to both the HR manager and the CEO. I would also follow this up by requesting a one-on-one meeting with the CEO to discuss how management will address this feedback and whether they plan to incorporate this feedback into decision making. |

c) After providing the CEO and Human Resources Manager with the feedback you received from the team, they have conceded that the new condition of 40 hours of professional development may need to be revised. However, the CEO remains adamant that some form of professional development must still take place. The CEO has asked you to come up with some recommendations as to how this issue could be resolved in a manner that will help resolve the team’s concerns while still meeting the need for professional development of staff. Draft an email to the CEO detailing two (2) recommendations. (Your response should be approximately 100 words)

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| Responses will vary but must make reference to some commonsense solution.  An example response is included below:  Dear CEO,  I have considered the feedback received from wellness practitioners regarding the new professional development requirements. My recommendations are as follows:  I think the requirement needs to be revised so that team members are required to undertake 30 hours of professional development over a two-year period instead of one year.  I think team members can be better supported in this process by being allowed one day of professional development during work hours per month. This time should be spent at work working on the online courses.  Regards,  The Operations Manager |

The following questions are related to the case study of Rediscover Recovery Wellness Centre. Imagine you are the Practice Manager of the Melbourne branch of the Rediscover Recovery Health Centre and answer the following questions.

4.10 As the Melbourne branch was only set up a few weeks ago, you notice that a team charter has not been developed. You decide to work together with your team members (i.e., staff at the centre) to develop the team charter.

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| **Rediscover Recovery Health Centre**  **Position Description – Practice Manager**  About Rediscover Recovery Health Centre  We are a health centre that specialises in rehabilitation care and offers a range of services including speech therapy, pain management, occupational therapist, physiotherapist, and more! Our goal is not just supporting clients to recovery and manage their condition, but also to support them in reaching a higher level of strength and independence. Our rehabilitation professionals achieve this by meeting clients’ health and recovery needs through a wide range of methods and therapies.  The following position description describes the responsibilities and performance outcomes required to perform the role of Practice Manager at Rediscover Recovery Health Centre.  **RESPONSIBILITIES**   * Managing accreditation and compliance matters * Managing the team of rehabilitation therapists * Accountability for the team of rehabilitation therapists meet their responsibilities * Directing the team’s activities and driving team performance * Identifying and troubleshooting daily operational issues * Developing and implementing marketing plans, including maintaining and managing the centre’s website * Providing the team of rehabilitation therapists with a stimulating and supportive environment * Assisting the CEO with setting performance targets * Maximising sales and profitability * Maintaining and increasing standards of customer service   **OTHER SKILLS REQUIRED**   * Highly developed communication skills * Confidence, drive and enthusiasm * Decision-making ability and a sense of responsibility * Planning and organisational skills * Commercial acumen |

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| **Rediscover Recovery Health Centre**  **Position Description – Rehabilitation Therapist**  About Rediscover Recovery Health Centre  We are a health centre that specialises in rehabilitation care and offers a range of services including speech therapy, pain management, occupational therapist, physiotherapist, and more! Our goal is not just supporting clients to recovery and manage their condition, but also to support them in reaching a higher level of strength and independence. Our rehabilitation professionals achieve this by meeting clients’ health and recovery needs through a wide range of methods and therapies.  The following position description describes the responsibilities and performance outcomes required to perform the role of rehabilitation therapist at Rediscover Recovery Health Centre.  **RESPONSIBILITIES**   * Meet with clients * Examine clients and assess their needs * Discuss treatment options * Design treatment plans * Keep accurate patient records * Collaborating with other therapists on the multi-disciplinary team * Other duties as required   **PERFORMANCE CRITERIA**   * Hold a recognized qualification in one or more of the following areas:   + Occupational Therapy   + Speech Pathology   + Physiotherapy   + Remedial Massage * Hold a current first aid certificate * Demonstrated ability to build client relationships * High level interpersonal skills and ability to relate to a wide range of clients * Be professional, friendly, and approachable * Be discreet, tactful, and confidential at all times |

Using the information provided above, write an official team charter that will be signed by all team members. A template for this charter has been provided below.

You must complete the purpose, responsibilities, and accountabilities sections of the charter. You must also ensure that your team charter conforms to Tranquillity’s organisational goals and objectives. (Your total response should be approximately 150 words)

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| Example response below: | |
| **Team Charter** | |
| **Purpose** | Rediscover Recovery Health Centre’s goal is not just supporting clients to recovery and manage their condition, but also to support them in reaching a higher level of strength and independence. Our rehabilitation professionals achieve this by meeting clients’ health and recovery needs through a wide range of methods and therapies. |
| **Responsibilities** | **Operations Manager:** Manage the team’s activities and provide support.  **Wellness Practitioners:** Though wellness practitioners have different specialties their collective responsibilities include:   * Meet with clients * Examine clients and assess their needs * Discuss treatment options * Design treatment plans * Keep accurate patient records * Collaborating with other therapists on the multi-disciplinary team * Other duties as required |
| **Accountabilities** | The operations manager will be responsible for directing the team’s activities and will be accountable for ensuring all team members are meeting their goals. |
| **Signed (by all team members)** |  |

4.11 A few weeks later, you became more familiar with the staff, especially the team of rehabilitation therapists. Recently, one of the speech pathologists, Raymond, approached you and told you he is struggling to meet his expected performance outcomes, especially his KPI. He shared that he finds it hard to retain clients, as most of them did not return after the first sessions, which led to a decrease in his caseload. He told you he thinks that he may not be as good of a speech pathologist than the others on the team when communicating with clients, hence the clients decided not to see him again. However, based on your own observation, you noticed that majority of Raymond’s long-term clients expressed their gratitude for his support and finds him an understanding and patient therapist.

Briefly outline two (2) ways you could support Raymond such that he can meet his expected performance outcome. (Your response should be approximately 80 words)

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| Student’s response must demonstrate the ability to support Raymond in meeting his expected performance outcome.  Responses may include, but are not limited to, reference to:   * I would provide encouragement and praise to Raymond’s work, especially the positive reviews that he has been receiving from his clients. This would ensure he has a positive attitude – feels recognised and become more confident in his work – so he could improve his work performance. * I would suggest Raymond attend a training program to improve his communication skills, such that he becomes more confident in interacting with clients when providing support. If the program is too costly, I would seek for approval from the CEO. |

4.12 During the past few team meetings, you notice that majority of the team members did not want to speak up and only expressed their opinion when called upon. You realise this may hinder team performance and you want to address this issue. After receiving feedback, you learned the team members often find you dominating the conversations during team meeting, and they barely have a chance to voice their opinions. You reflected and decided to improve the way you communicate.

Briefly outline two (2) strategies that you will keep in mind during the next team meeting to facilitate team member input. (Your response should be approximately 60 words)

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| Student’s response must demonstrate the ability to develop strategies to facilitate team member input.  Responses may include, but are not limited to, reference to:   * Thank people who speak up. When your member comes to you and share their concerns or ideas, always thank them for bringing it up with you. * Think about how you ask the question. It’s important that you ask open-ended questions in brainstorming sessions. * Ask for input consistently. Asking team members for input and discussing this input, takes time. For this reason, many managers do not allow team members to contribute consistently. * Do not request issues raised to come with a solution. Not every team member is a problem-solver and bringing the issue or concern to light is much useful rather than the member not saying anything due to not having a solution. Further, discussing it amongst the team may generate more creative or simpler solutions. * Take action on team members input consistently. It is important that if managers ask for input, they then make an attempt to incorporate the input into decision making wherever possible. * Provide feedback after the discussion. It is important for managers to provide feedback to team members on the outcomes of these discussions. Team members must be informed about which of their ideas were used and why. If suggestions were not implemented managers should explain why. |

4.13 Recently, you notice one of the occupational therapists, Karissa, has been showing signs of being unmotivated at work, including sending apologies for team meetings. Further, Karissa has not been attending whole team meetings that usually involves learning from another profession, e.g., speech pathology and physiotherapy. You also received feedback from some clients that Karissa sometimes appears to be “not in the zone” during therapy session.

Outline the six steps that you would take to address this issue such that Karissa will feel encourage to attend meetings and be held accountable for her work performance. (Your response should be approximately 180 words)

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| Student’s response must demonstrate the ability to address motivation issue and encourage staff to participate in team activities and improve work performance.  Responses may include, but are not limited to, reference to:   * Step 1: Talk to the team members. The first step is to talk to the individual concerned privately and find out whether there are any circumstances that are contributing to the situation. * Step 2: Ensure team members have adequate resources they need to do their job. * Step 3: Communicate roles, responsibilities, and objectives. It is essential that your team members know exactly what their job roles and responsibilities are by consulting the team charter that they have signed. * Step 4: Help the team members re-engage with their roles. The problem may stem from the team member feeling apathetic about their role. In this case, make sure the employee understands the overall goals of the organisation and how their role ties in with the bigger picture of the organisation. * Step 5: Help team members take control. If you suspect that a team member is feeling overwhelmed with their role, you might want to break up any large tasks into smaller goals or steps. * Step 6: Provide plenty of positive feedback. When team members do take responsibility and perform well, a manager should recognise this by providing them with consistent, effective, and fair feedback. |

4.14 After a year of operation, the practice hired a few new rehabilitation therapists to cope with the increased caseload a few weeks ago. You received feedback from a few team members that there has been poor teamwork and not much collaborative work achieved for the past few weeks. Some feedback expressed unsatisfaction about the ineffective communication and lack in team collaboration. You then decided to brainstorm some strategies to encourage team participation and thus improve team performance.

Briefly outline two (2) strategies that you would implement to address this issue. (Your response should be approximately 80 words)

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| Student’s response must demonstrate the ability to encourage team members to participate in team activities to improve teamwork.  Responses may include, but are not limited to, reference to:   * **Encouraging active listening.** Managers should encourage team members to engage in active listening when others are sharing their opinions and thoughts. Team members should be encouraged to pay attention to what others are saying, not interrupt, and provide their considered response only after hearing and absorbing other team member’s opinions. * **Leading by example.** Managers should themselves remain open to suggestions and concerns from team members by actively listening and providing authentic feedback. * **Delegating problem solving tasks to the team.** A great way to encourage participation is to delegate team members to work together to achieve a solution. While this is being done, the manager can monitor the process and provide support where necessary. This can foster the team members’ sense of responsibility and ownership of the team’s output. * **Encouraging team members to share information.** Emphasise to team members the importance of their individual role and how it combines with other team member’s work to achieve the team’s goals. * **Encouraging trust and cooperation between team members**. The relationships team members develop between themselves are as important as their relationship with their manager. It is important to pay close attention to how team members are working together and take steps to improve communication, trust, and respect in those relationships. A common way managers achieve this is to provide team building activities to strengthen team relationships. |

4.15 After implementing some of the strategies, you received further feedback that made you reflect on your actions and behaviours around team members. You realise you are not entirely open and honest with your team, and sometimes do not communicate with them in an effective manner, which contributed to the low trust and cooperation between the team members. The new team members also find it intimidating to approach you for support. This then subsequently leads to ineffective communication and poor team performance.

Briefly outline one (1) thing you could practice to model desired behaviour as well as promote team collaboration. (Your response should be approximately 70 words)

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| Student’s response must demonstrate the ability to model desired behaviour to promote team collaboration.  Responses may include, but are not limited to, reference to:   * Be honest and open. Honesty is a crucial responsibility for success as a leader. A successful leader is honest, and will expect their employees to be honest too. If employees feel like their leader is honest with them, they are much more likely to be honest in return. This is an important element for a great company culture and organisational success. * Keep communication channels open. Open communication means there are less misunderstandings and issues on a team. Good communication skills are key in leadership that is impactful. When leaders have open communication, the team knows exactly what is expected of them, when things need to be done, and the process. Communication channels need to go both ways so employees can connect with their leader if there is an issue and know they will be heard. |

4.16 Two weeks ago, you received an email from the CEO. The email stated a decline in revenue, specifically a decrease in caseload over the past two months. You are tasked to evaluate the issue and take any necessary corrective action to address it.

Over the past two weeks, you have been gathering feedback from the team members at the branch and you summarise them into the following:

* Low sales incentives/bonus and hence feel unmotivated to see more clients or to help promote their services.
* Long work hours performing administrative tasks that are mostly irrelevant to their role, and this hinders them from seeing actual clients.
* Inflexibility as to when they could see clients due to a fixed hours of administrative tasks needs to be completed. E.g., every afternoon from 3pm to 6pm needs to be used for completing administrative tasks but most clients prefer to have their session then.

Outline and explain two (2) specific corrective actions that you would suggest to your CEO for them to consider implementing it and improve team performance. (Your response should be approximately 70 words)

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| Student’s response must demonstrate the ability to take appropriate corrective action to address issues to promote team performance.  Responses may include, but are not limited to, reference to:   * Suggest switching administrative hours to off-peak hours or remove the set hours so that each rehabilitation therapist can complete administrative tasks at their own time. This way, they have the flexibility and are able to complete the tasks while see clients where they see fit. * Review the administrative tasks that are assigned to these therapists and see whether these can be delegated to team members whose roles are more suitable and relevant. * Other logical responses are also accepted |