

Team Performance Index

While the traditional unit of appraisal in an organization is the individual, increasingly the focus is on the team to get things done. Individuals are reliant on others with whom they work. Quality performance requires a team effort, and success to a large extent depends on an individual's ability to manage the "people resources" as well as the material resources.

A measure has been developed which provides a structured way of measuring the performance of a team. This takes into account the complementarity of team members, how they balance one another's strengths and together represent a quality unit. The measure is the Margerison-McCann Team Performance Index. It has as its base the "types of work" model which describes all the functions necessary to be performed by a quality team unit (see Figure 1). The model and descriptions of the types of work are produced below, based on research with team members in manufacturing, service, process and government organizations.

Advising

The Advising function involves keeping up to date with developments inside and outside the organization and passing advice on to others to help them in their work. It requires a knowledge of "what is going on" and "where", so that information can be gathered and shared quickly, accurately and effectively.

Generating new ideas

Innovating

The Innovating function involves generating new ideas and new ways of doing things. Organizations need constantly to think up new products and services that will keep them up with, or one step ahead of, their competitors. To do this well requires original thought, imagination, inventiveness and innovative thinking.

Promoting

The Promoting function is concerned with the identification of opportunities and the "selling" of these opportunities to others, both inside and outside the organization. It often involves the application of "influencing" skills and the making of presentations to others. It can also involve communicating the team or organizational "vision". High visibility throughout the organization may also be required.

Developing

The Developing function is associated with the turning of concepts into "reality". Ideas are worked on to produce practical products and services.

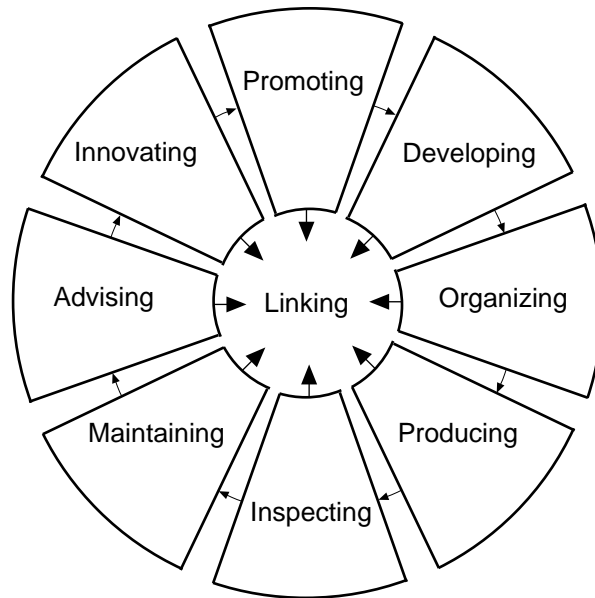


Figure 1. Margerison-McCann types of work wheel

This function is concerned with the planning process to move ideas into operational activity.

Organizing

The Organizing function involves organizing people and resources efficiently to get tasks done. Emphasis is put on setting clear goals and objectives and making people accountable for their actions. It is the function that insures that the work of others is focussed and structured to achieve objectives.

Producing

The Producing function focusses on outputs, insuring that tasks are completed to high standards of effectiveness and efficiency. It is the function associated with the regular delivery of products and services. It requires a systematic approach to work.

Inspecting

The Inspecting function requires an attention to detail and an emphasis on establishing procedures and reviewing systems, contracts and outputs. It is also associated with a focus on accuracy, insuring that work outputs are always delivered to the right quality.

Maintaining

The Maintaining function is a support function which insures that proper standards of conduct and ethics are upheld and that quality is maintained. It is also associated with supporting others in the organization so that corporate values and standards are preserved.

A team approach

The eight types of work were established through extensive interviews with managers and team members in a wide range of industries throughout the world. Subsequent empirical studies have confirmed the validity and utility of the eight factors.

Attention to detail

Individuals, by nature of their work, have preferences which are a function of both their personality and work experiences, and are attracted to particular types of work. The extrovert creative person, for example, may welcome activities like selling, presenting, and generating ideas. The person who has a more introverted and practical approach to work may choose more systematic and detailed work.

In team management terms, the former has a preference for Innovating and/or Promoting work and the latter has a preference for Inspecting and Producing types of work. While individuals should be encouraged to work in areas that match their preference, it is the responsibility of the team as a whole to make sure all types of work are covered.

Individuals may feel their own approach to work is the one to follow, and fail to recognize the value of other types of work, particularly those opposite them on the types of work wheel. In some cases this results in stereotyping of the “people”. Those working in “Inspecting” areas may be seen as too detailed and those who are primarily “Promoting” and “Creating” can be seen to have their “heads in the clouds”. The object of using the team wheel is to show all contributions are essential to success.

The Team Performance index (TPI)

This enables team members and their clients to assess the team’s performance. It provides a benchmark from which to measure, analyze, and identify the “gaps” in the work of a team which may not be apparent using less structured measures. The literature on team failure (see for example the pioneering work of Janis⁽¹⁾), suggests that disciplined, structured introspection is vital to the ongoing health of a team.

It may be difficult for team members to rate their team objectively on the key performance factors as the assessment will invariably be “colored” by their own experience. Different team members will have their own views on how the team is performing. Customers or clients may also give different views, depending on what sort of service they have received in the past.

TPI is a comparative instrument

For this reason the TPI is a comparative instrument whereby team members can express their own views. These can then be compared with the views from people outside the team. The interpretation of the results is then a matter for the team members themselves, who can “weigh up” the various responses and then take the appropriate action. It is commonly referred to as taking a 360-degree viewpoint.

The TPI divides those who make the assessment into five different categories:

- (1) *The team members.*
- (2) *Co-worker group A* – normally members of other teams in the same organization.
- (3) *Co-worker group B* – normally clients or customers of the team.
- (4) *Co-worker group C* – normally anybody else not included in other categories.
- (5) *A supervisor or senior management group.*

Assessment of factors

Any assessment of the team performance factors *must* include representatives from the first category and preferably also from the third and fifth categories. There is no limit to the number of people who may be invited to participate in the study; the greater the number then the more useful the data.

An example of team performance assessment

Sue is the manager of a client services team of six people and reports to the marketing director. She also works closely with the sales and product departments. She decides to have her team rated using the TPI and decides on the following participants:

- *Team group*: her six team members.
- *Co-worker group A*: two people from sales and two from production.
- *Co-worker group B*: three major customers of the organization.
- *Co-worker group C*: no one.
- *Supervisor group*: herself and the marketing director.

In all, 15 people each completed a TPI on the team. Sue could have placed herself in the team category but decided on the supervisor group along with her supervisor. She was particularly interested in how the other team members saw the performance of the team. She wanted data which would not be biased by her own responses.

The TPI has 54 questions designed to measure the team performance factors. For each question the people completing the TPI are asked to rate “To what extent” the activity listed should occur (“Not at all”, “To a little extent”, “To some extent”, “To a great extent”, or “To a very great extent”), given the mission and objectives of the team. Having assessed the importance of the activity, the rater is then asked to assess to what extent the team actually *does* perform that activity. Thus the instrument measures the gap between what “is” and what “should be”.

The feedback

Feedback from the TPI provides information, from a total team view of the areas that can be improved. Differences in ratings between team members can also be discussed and clarified in team discussions.

Also valuable is the assessment of an outsider (maybe a consultant or facilitator) who is aware of the work of a team but is not necessarily part of it. From this “structured introspection”, action plans are generated which aim to make up for the gaps.

For example, a team that sees itself as weak in promoting and innovating can embark on training in idea generation and influence techniques. It may invite others into the team with experience or preferences in these areas, or ask one team member to volunteer to focus on those areas as a contribution to the team process.

A team which has a deficiency in “organizing” may adopt a structured organizing process to the team’s work such as deadlines and action plans. A team which is poor in “advising” could investigate new ways of accessing relevant information.

Feedback provides information

Why differences have occurred

Figure 2 is an example of some of the quantitative output that results from a TPI analysis. The qualitative written output is not provided here, but is an essential part of the output. As can be seen, the output provides a good basis for discussing the work of a team, and how closely the analysis reflects perceived reality.

The bar charts indicate the range between D for “Does do” to S “Should do”. The figures in the second column indicate the range and in particular the gap. It is up to the team to meet with those who gave the ratings and discuss why differences have occurred and what to do about them.

Applications

Some teams who have used the TPI have completed it on several occasions and compared the scores to see whether any improvement had occurred. Other teams schedule periods during meetings where they audit the success of the new process and fine tune their own interventions.

Case A

A project team which was having difficulty meeting targets decided to use the TPI to review its performance. The team rated itself high on organizing. Their clients however disagreed. They indicated that the team needed to pay more attention to the advising and linking issues. As a result, meetings were held with clients to discuss how these issues could be addressed.

Team performance factors	Should occur	Does occur	Gap	Not at all 0	To a little extent 1	To some extent 2	To a great extent 3	To a very great extent 4
<i>01 Advising</i>								
Team	3.12	2.49	0.63				D	S
Rating group A+B+C	3.92	2.17	1.75				D	S
Supervisor group	3.21	2.54	0.67				D	S
<i>02 Innovating</i>								
Team	3.00	2.29	0.71				D	S
Rating group A+B+C	3.83	1.92	1.92				D	S
Supervisor group	2.71	2.21	0.50				D	S
<i>03 Promoting</i>								
Team	2.81	1.96	0.85				D	S
Rating group A+B+C	3.83	1.46	2.38				D	S
Supervisor group	3.08	1.21	1.88				D	S
<i>04 Developing</i>								
Team	3.31	2.33	0.98				D	S
Rating group A+B+C	3.92	2.00	1.92				D	S
Supervisor group	2.92	2.08	0.83				D	S
<i>05 Organizing</i>								
Team	3.10	2.15	0.96				D	S
Rating group A+B+C	3.58	1.83	1.75				D	S
Supervisor group	3.13	1.46	1.67				D	S
<i>06 Producing</i>								
Team	3.10	1.91	1.18				D	S
Rating group A+B+C	3.75	1.67	2.08				D	S
Supervisor group	3.13	1.96	1.17				D	S
<i>07 Inspecting</i>								
Team	3.08	2.06	1.02				D	S
Rating group A+B+C	3.92	1.58	2.33				D	S
Supervisor group	2.92	2.29	0.63				D	S
<i>08 Maintaining</i>								
Team	3.02	2.02	1.00				D	S
Rating group A+B+C	3.79	1.79	2.00				D	S
Supervisor group	3.08	2.42	0.67				D	S
<i>09 Team linking</i>								
Team	3.29	2.21	1.08				D	S
Rating group A+B+C	3.92	1.75	2.17				D	S
Supervisor group	3.42	2.00	1.42				D	S

Note: D = does do
S = should do

Figure 2. Summary of perceived team performance

Key to the TPI approach

Case B

A team involved in information management felt they needed to put more emphasis on promoting their services. They checked this out by inviting one of their clients to provide feedback via the TPI. The data indicated more effort was needed in this area and discussions took place on how to improve performance.

Summary

The key to the TPI approach to measuring team performance is that it is “self-assessment”. Team members act as assessors of team performance as a whole and develop self-criticism and development skills.

Most importantly, however, the TPI focusses team members on the team task rather than individual agendas. It recognizes the fact that organizational tasks are interdependent rather than operating in isolation, and that success is a result of how people work together rather than the quality of their individual performance alone.

Reference

- (1) Janis, I.L., *Victims of Groupthink*, Houghton Mifflin, Boston, MA, 1971.

Further reading

Margerison, C.J. and McCann, D.J., *Team Performance Index Manual: A Guide for Members of the TMS Network*, Team Management Systems, York, 1993.

Margerison, C.J. and McCann, D.J., *Team Management: Practical New Approaches*, Mercury Business Guides, London, 1995.

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