Discover the Team Alignment Map

What it is and how it works

1

“Working together itself takes work.”

Herbert Clark, Psycholinguist

Overview

Understand the layout and content of each column, plan and reduce risks, and assess projects and teams.

1.1
Getting Started: The Four Pillars of the Team Alignment Map

How to describe joint objectives, team member commitments, required resources, and risks.

1.2
Planning Who Does What with the Team Alignment Map (Planning Mode)

Start with a forward pass (the plan), then make a backward pass (to lower any risks).

1.3
Keeping Team Members on Track (Assessment Mode)

Use the Team Alignment Map to assess team readiness or address ongoing problems.

1.1
Getting Started: The Four Pillars of the Team Alignment Map

How to describe joint objectives, team member commitments, required resources, and risks.




The Workspace

The workspace is divided into two parts: the header area to frame the collaboration and the content area to guide meetings with regard to the four pillars. Each pillar covers a crucial aspect for any successful collaboration.

Joint Objectives
p. 54
What do we intend to achieve together, concretely?

Joint Commitments
p. 62
Who will do what?

Joint Resources
p. 70
What resources do we need?

Joint Risks
p. 78
What can prevent us from succeeding?

→
Dive Deeper
To discover the academic backstage of the Team Alignment Map, please read p. 258: Mutual Understanding and Common Ground (in Psycholinguistics).

Header Area

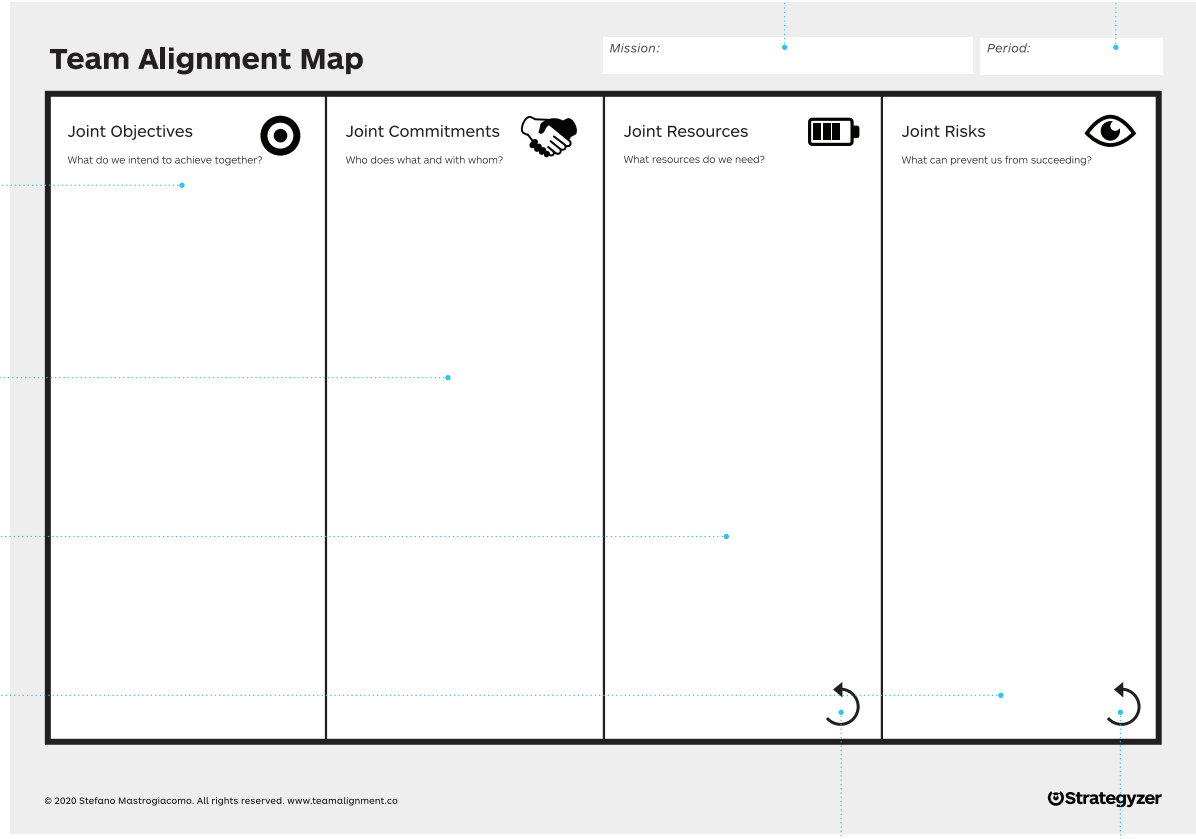
Give context and focus.

Mission

Give meaning and context by explaining the purpose of the meeting or the project (p. 52–53).

Period

Set a timeframe in days, months, or a deadline to start getting real (p. 52–53).



Content Area

Space to work.

Backward pass indicators

Visual reminders that risks must be addressed as a team (backward pass, p. 78–79).

Mission and Period

A mission is the starting point of any collaboration, the glue that brings everyone together. It helps everyone understand what's at stake and provides a rationale for personal engagement because:

- It is appealing, or
- Everyone feels concerned, or
- It is a necessary part of everyone's duties.

Participants constantly ask themselves "Why am I here?" when missions are unclear. Attention and participation drop, the conversation jumps from subject to subject, and dialogue becomes inconsistent, making participants feeling confused and often bored.

Periods set a time horizon for the team. Time limits are essential: they help remove exotic considerations in terms of goals and immerse everyone in the realm of concrete actions.

The header area helps participants simply understand why they are there and creates interest in listening and participating.

+
Describing Meaningful Missions

To benefit from higher levels of team buy-in and motivation, describe missions positively and from a participant's perspective. Respect these criteria as much as possible when writing down a mission: challenging, audacious, unique, unusual, or fun.

Example
- DO: Strengthen our profitability and secure our salaries for the next three years. [goal + benefit]
- DON'T: Reduce costs by 30%.

As described by Amy Edmondson, people must agree on and feel proud of their team's mission to motivate their personal efforts and overcome the relational and technical hurdles to succeed (Edmondson and Harvey 2017; Deci and Ryan 1985; Locke and Latham 1990).

Search keywords: mission statements; naming projects.

+
"Buy-In Check"

It's ideal for a mission to be validated using the following statement:

For the entire duration of the mission (M), every participant is able to give meaning to his or her personal contribution (X) by thinking:

"I am doing X because my group is doing M and requires my X, and that is meaningful for me."

Mission
What's the challenge?
What do we want to create or improve?

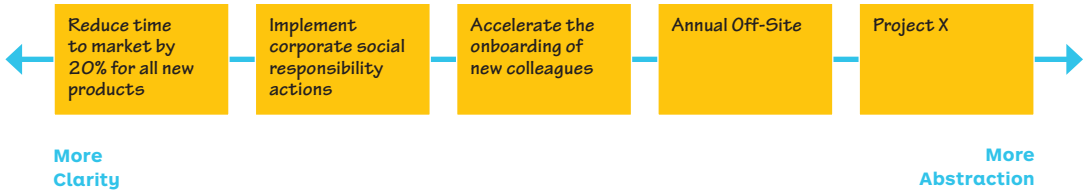
Period
For how long?
Until when?

A mission can be described in various formats such as a purpose, challenge, problem, project name, and so on.

Any of these formats will work as long as the mission:

- Is crystal clear for all participants,
- Helps people project themselves in a positive outcome, and
- Generates a personal desire to contribute

Mission examples:



A period can be defined as:

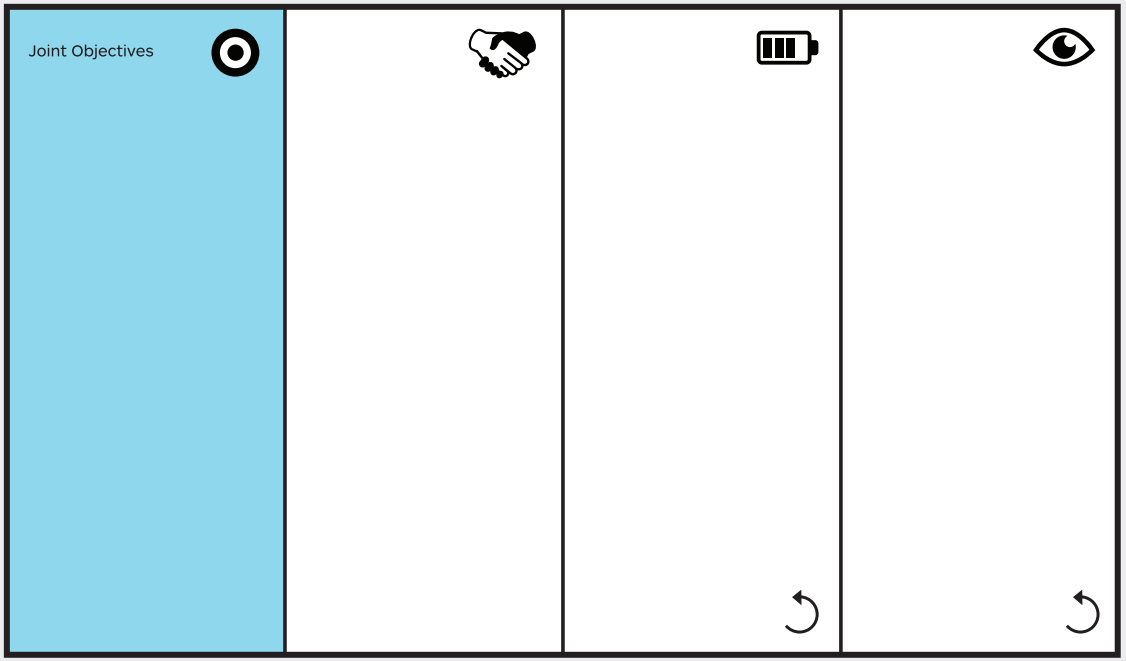
- A duration: number of hours, days, weeks, or months.
- A deadline: a precise date or a range between two dates.

Period examples:

Joint Objectives

What do we intend to achieve together, concretely?

Team Alignment Map



Does anyone understand what we're supposed to do?

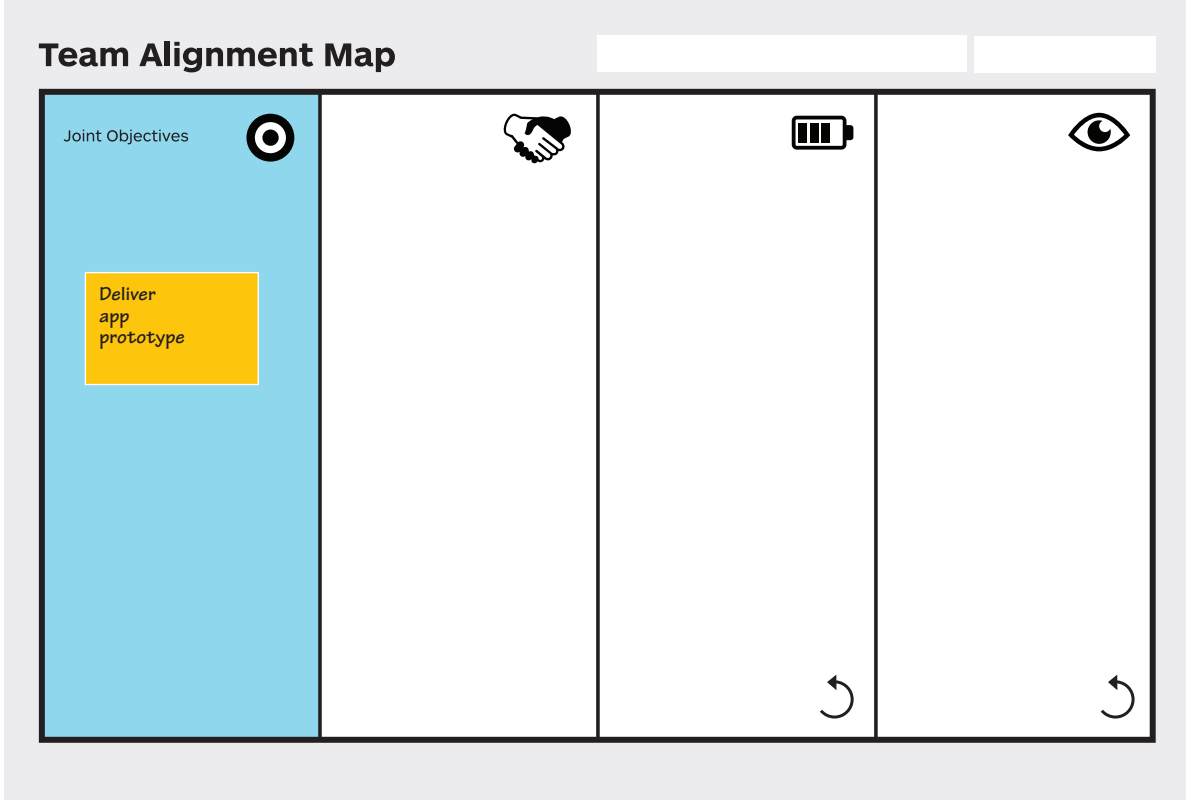
What Are Joint Objectives?

Clear joint objectives align participants' intentions on what needs to get done, expressed in terms of:

- Goals (intention to be achieved)
- Objectives (measurable goals)
- Activities (something to be done)
- Actions (pieces of activities)
- Tasks (pieces of actions)
- Work packages (work given to a person)
- Results (consequences of activities)
- Deliverables (synonym for results)
- Outcomes (synonym for results)
- Products, services (synonyms for results)

The TAM is a semi-structured tool. The key here is to agree on actionable work; however, it may be shaped. A typical TAM contains 3–10 joint objectives. If you have more than 10 objectives, ask the team if the mission is not too broad or ambiguous. You may be describing several projects at once. Consider splitting it into several TAMs if this is the case.

Setting joint objectives as a team helps break down the mission into actionable pieces of work.



Ask

- What do we intend to achieve together, concretely?
- What do we have to do?
- What do we need to deliver?
- What work must be done?

Examples

Create a plan

Paint the interior

Hire a consultant

Grant access rights

Amend contracts

Install electrical wires

Negotiate leasing

Standardize onboarding process

Update product backlog

Examples of Joint Objectives

Joint objectives can be described in more or less detail.
The tradeoff is between clarity and speed.

Goals

An adjective
+ a noun

Goals are intermediary achievements to get to the end results.

End Results

An action verb
+ a description

Results are outcomes, deliverables, products, or services that happen or materialize in the case of success.

Objectives

An action verb
+ a description
+ something measurable

Adding a measure to a goal creates an objective.

More Technical

As a market developer, I need an advertising budget, so that I can promote our product line in China airports.

Grow market share in China.

Grow market share by 20%, in China airports, for the entire product line, by the end of this fiscal year.

High Granularity or Details

Less Speed, More Clarity

User Stories

As a < *role* >,
I want < *objectives* >,
so that < *reason* >.

User stories are a technique to describe user requirements in agile software development. This approach is increasingly adopted by other industries to describe objectives from a user perspective.

Search: user story

OKR (Objectives and Key Results)

Goal + key results

OKR is a system to describe joint objectives, initially developed by Andy Grove while he was CEO of Intel. The method became famous after being adopted by Google. To write an OKR you have to specify measurable key results for each goal.

Search: OKR

SMART Objectives

SMART stands for specific, measurable, achievable, realistic, and time-bound. This way of describing objectives is usually associated with the popular concept of "management by objectives" presented by Peter Drucker in the 1950s.

It's of great use in situations where objectives do not change on a regular basis.

Search: SMART Objectives

+

Always start your TAM by clarifying the joint objectives

Work can't be directed and organized as a team if the joint objectives are unclear. It was Thomas Shelling's (game theory pioneer and Nobel Prize winner) insight that "joint actions are created from the goal backward. Two people realize they have common goals, realize their actions are interdependent, and work backward to find a way of coordinating their actions in a joint action that will reach those goals." In other words, regardless of its duration (for example, 3 weeks, 3 months, or 3 years), a plan has no value in terms of work if the objectives are unclear.

+

Objectives decomposition and granularity

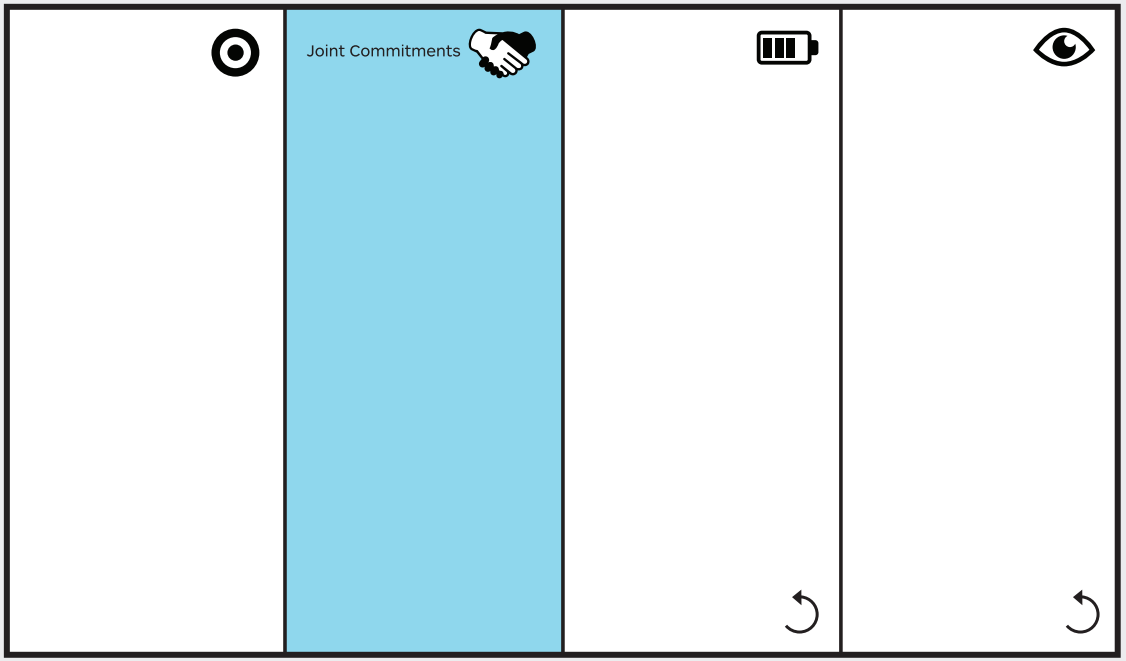
The Team Alignment Map has not been designed for detailed task decomposition and tracking. The tool helps members align rapidly on key topics to collaborate more effectively. If higher levels of granularity are required, report and decompose the joint objectives in a project management tool after the team alignment session. Validate the decomposed list with the team afterwards.

Search keywords: work breakdown structure; backlog

Joint Commitments

Who will do what?

Team Alignment Map



Sure, I'll get right back to you!

What Are Joint Commitments?

By establishing joint commitments, team members commit to take over and carry out one or more joint objectives. There is not much to write on the notes; names and high-level roles are usually enough. However, the ritual of each member committing in front of others plays an important role. This can be done in two ways:

- The team member writes his or her name next to the objectives he or she will be responsible for, or,
- The team member agrees by saying "okay," "I agree," "fine for me," or "I'll do it" if someone has placed their name on the TAM.

Ambiguous commitments result in a lack of accountability and occur mostly in teams where commitments are implicit, i.e. unspoken. Unspoken commitments create a gray zone in which participants can presuppose what the others will do at their convenience, which increases the likelihood of confusion and conflict. This can be reduced just by speaking clearly.

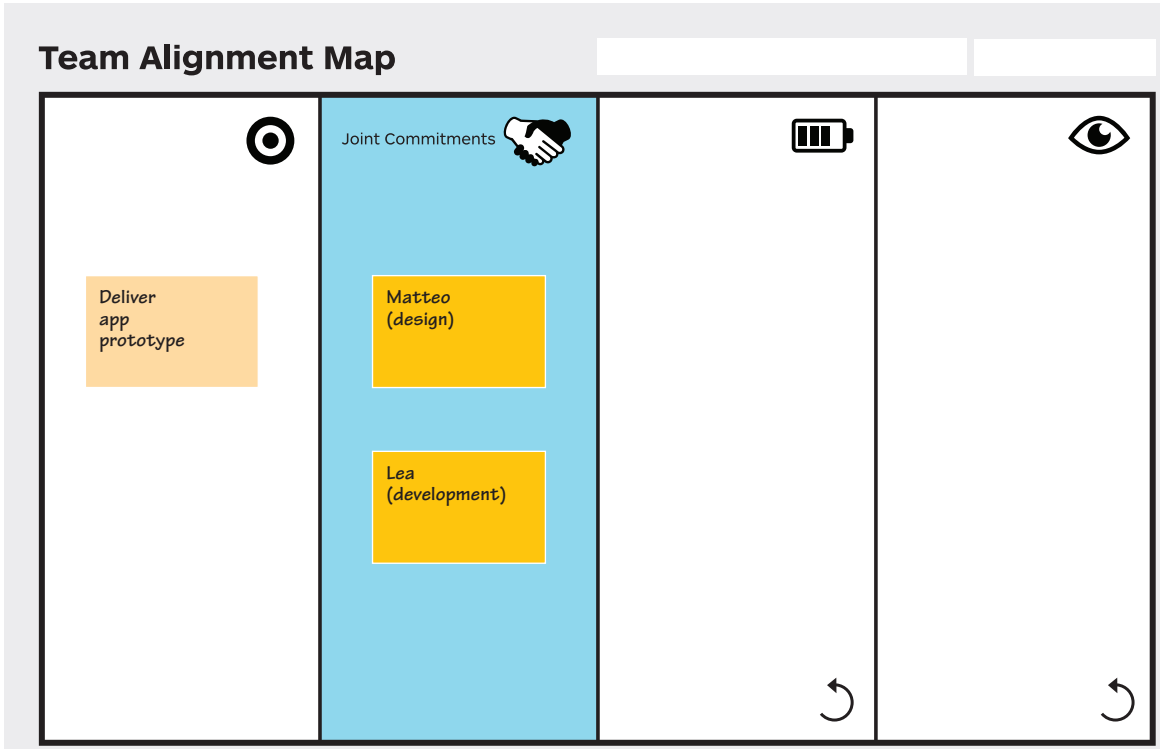
→

The Joint Commitment Ritual: Discover the Work of Margaret Gilbert

Margaret Gilbert is a British philosopher who investigated the notion of joint commitment for decades. She observed that to create pertinent joint commitments it is necessary and sufficient that team members express their readiness to be committed in front of others (Gilbert 2014). This makes commitments enter the team's common ground or common knowledge (see Dive Deeper, p. 252). Agreeing openly on joint commitments creates moral obligations and rights. Each team member who makes a commitment has the moral obligation to do his or her part, and in return the right to expect others to do their part. These rights and obligations bind team members and act as a powerful driving force.

Search: Margaret Gilbert philosophy

Joint commitments move participants from the status of individual to the status of active team member.



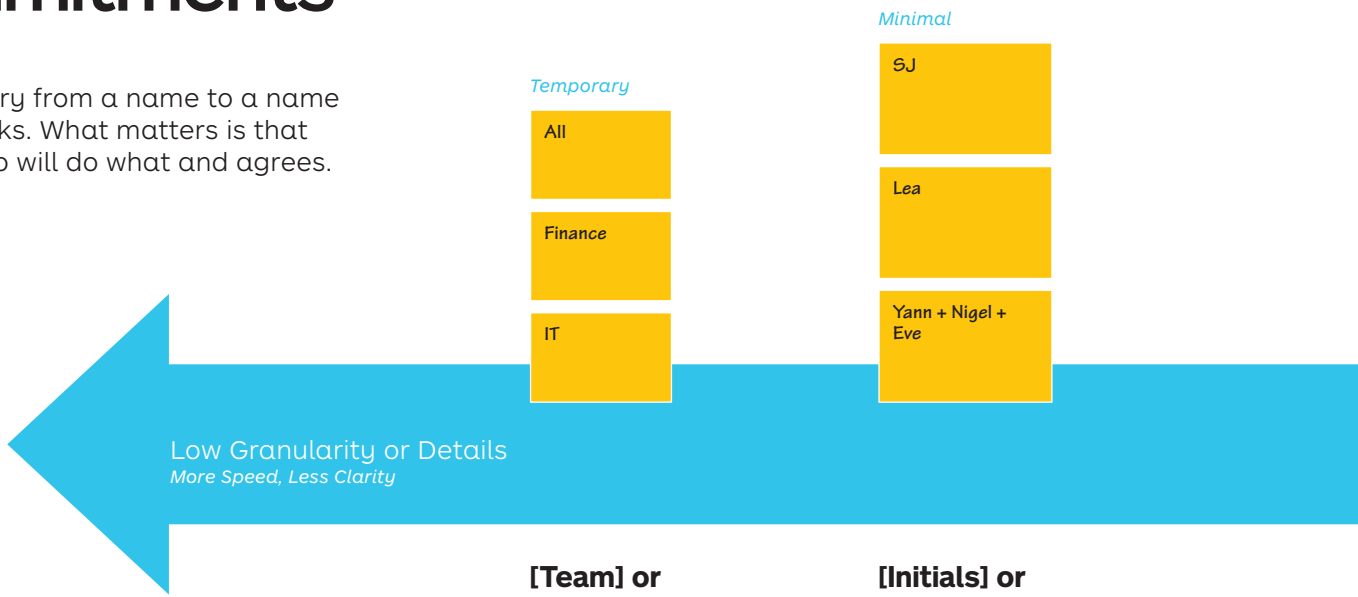
Ask

- **Who will do what?**
- Who commits to what?
- How will we work together?
- What's everyone's role?

Joint commitments are usually placed to the right of the related joint objective.

Examples of Joint Commitments

Joint commitments can vary from a name to a name with a list of high-level tasks. What matters is that everyone understands who will do what and agrees.

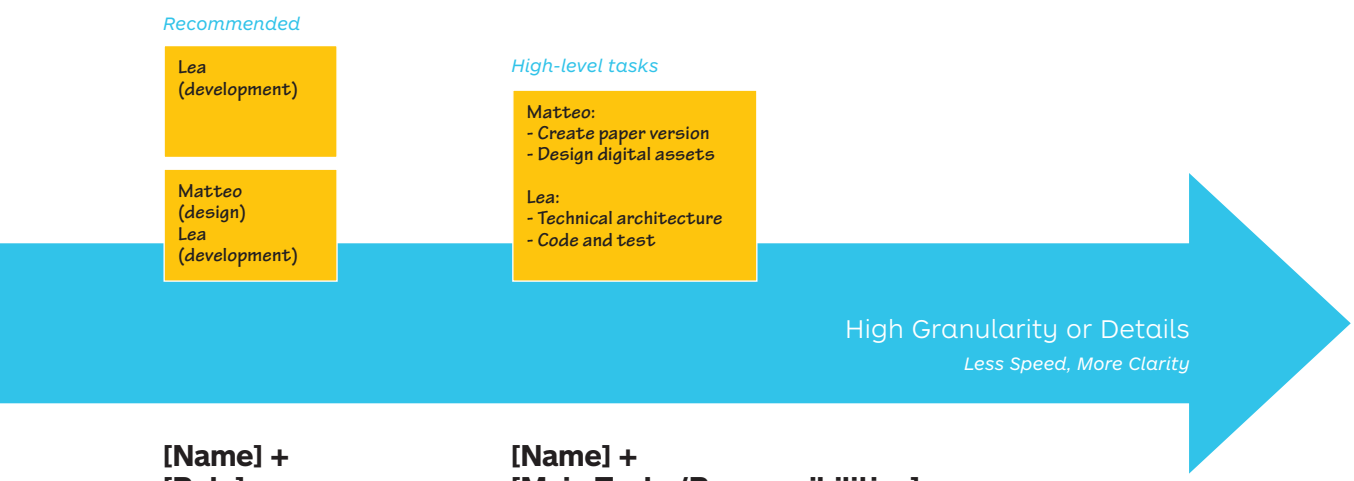


[Team] or [Department]

A team's name is useful when not all commitments can be clarified right away. This is the quickest method, but commitments will need to be clarified rapidly to avoid misunderstandings.

[Initials] or [Names]

Initials and first names are fast and useful for team members who are used to working together.



[Name] + [Role]

In addition to the name, describing each person's role or task concisely increases mutual clarity, while not slowing down the alignment session.

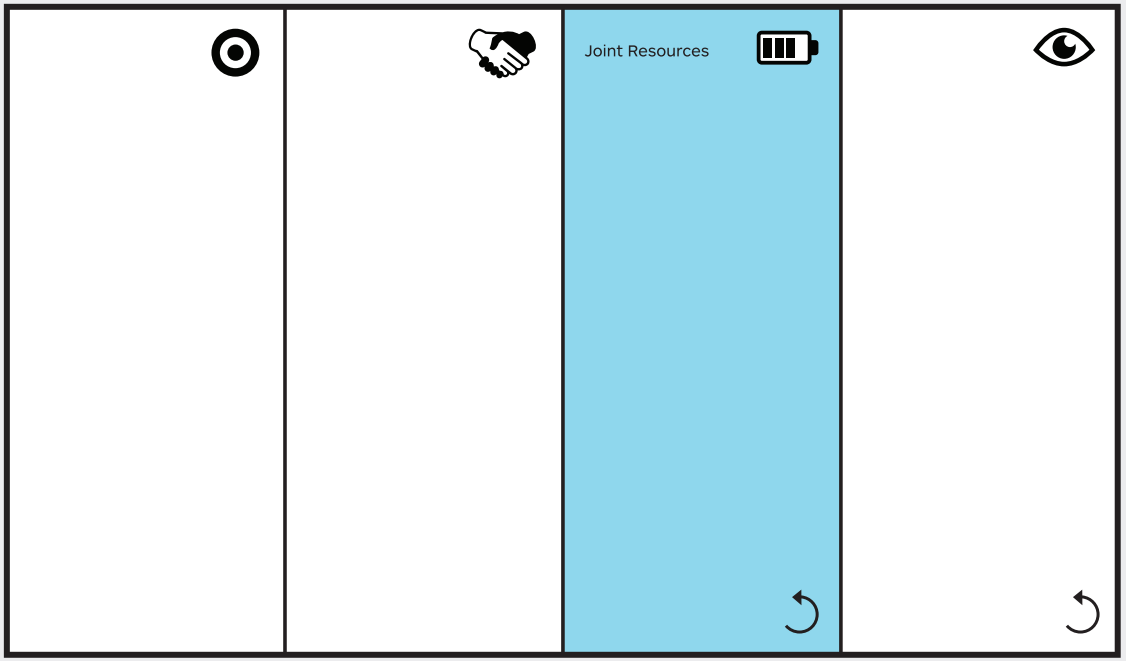
[Name] + [Main Tasks/Responsibilities]

High-level tasks can also be added. This longer approach is sometimes used by newly created teams. Beware of assigning subtasks that meet an objective in the Joint Objectives column to avoid confusing the team about what goes in each column.

Joint Resources

What resources do we need?

Team Alignment Map



I lack resources!

I lack resources!

I lack resources!

What Are Joint Resources?

All human activities require resources such as time, capital, or equipment. Describing the joint resources consists of estimating these requirements so that every team member can contribute successfully. This anchors the team in the real world by increasing the joint awareness of what is eventually needed to achieve the mission.

When resources are lacking, teams lose the ability to deliver because individuals get stuck. Workflows are interrupted and the proper achievement of the mission is compromised. Estimating and negotiating resources is key but insufficient. Resources must then be allocated, i.e. be made available for team members to perform. Do not hesitate to insist on this point in case of doubt.

+
Resource status

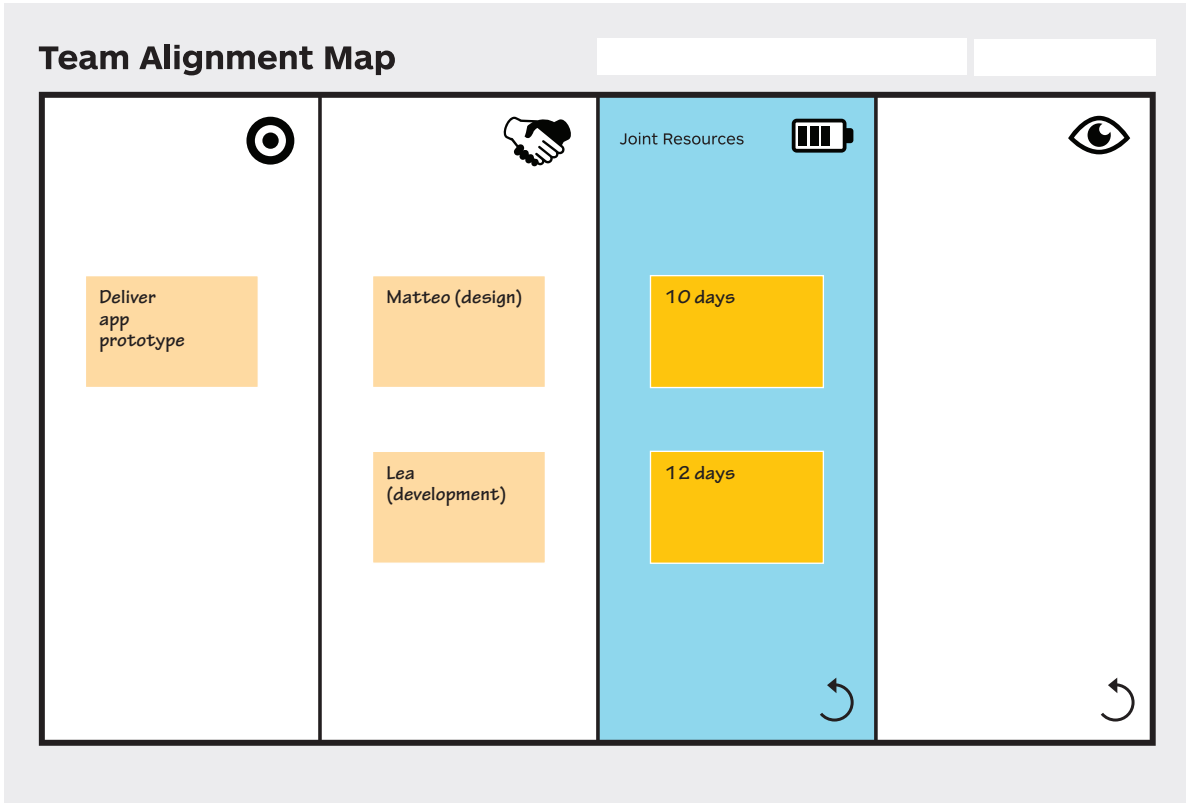
The status of a resource can be indicated as follows:

Available

Not available

Don't know

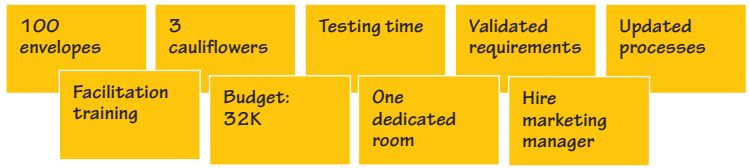
Joint resources help the team evaluate what is needed by each team member to do his or her part.



Ask

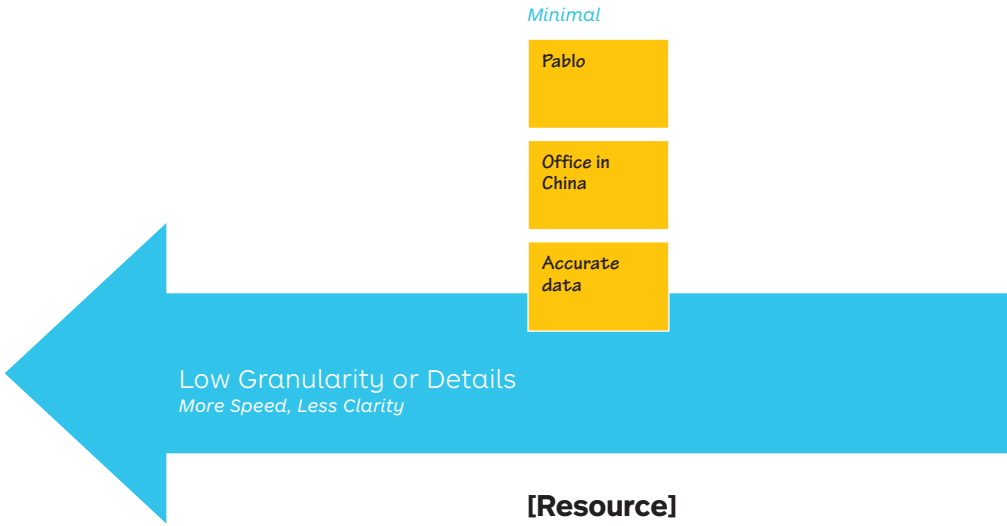
- **What resources do we need?**
- What should be made available or acquired?
- What is missing for everyone to contribute successfully?
- What are the necessary means to achieve our work?

Examples



Examples of Joint Resources

If a team member needs something to do his or her work, then it's a resource! Resource needs can be described with more or less accuracy; the tradeoff is always between speed and clarity.



[Resource]

Designating the resources can be a first step. That keeps the conversation moving in the right direction, i.e. identifying what is needed to get the job done.

Recommended

Pablo – 10 days

Flyers – 100

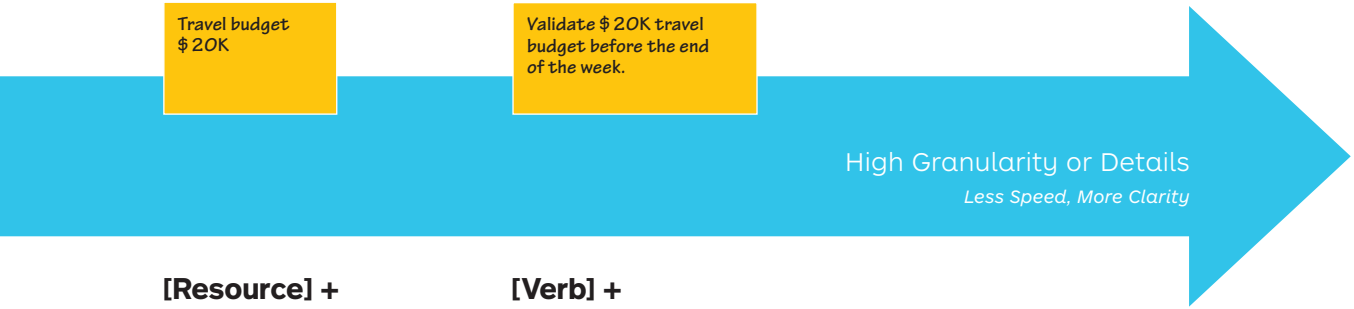
Travel budget $ 20K

With constraints

Need Pablo for 10 days at a max. cost of $ 1.5K/day

Print 100 flyers (needed before June 3rd)

Validate $ 20K travel budget before the end of the week.



[Resource] + [Estimated Quantity]

Naming and quantifying the resources creates a superior level of alignment and realism among team members. Suggest an interval or amount (1–10; $20–80K) when it's difficult to provide a single estimate.

[Verb] + [Estimated Quantity] + [Resource] + [Constraint]

This longer template can help align the team when high levels of accuracy are needed for critical resources. Used only in specific cases.

+

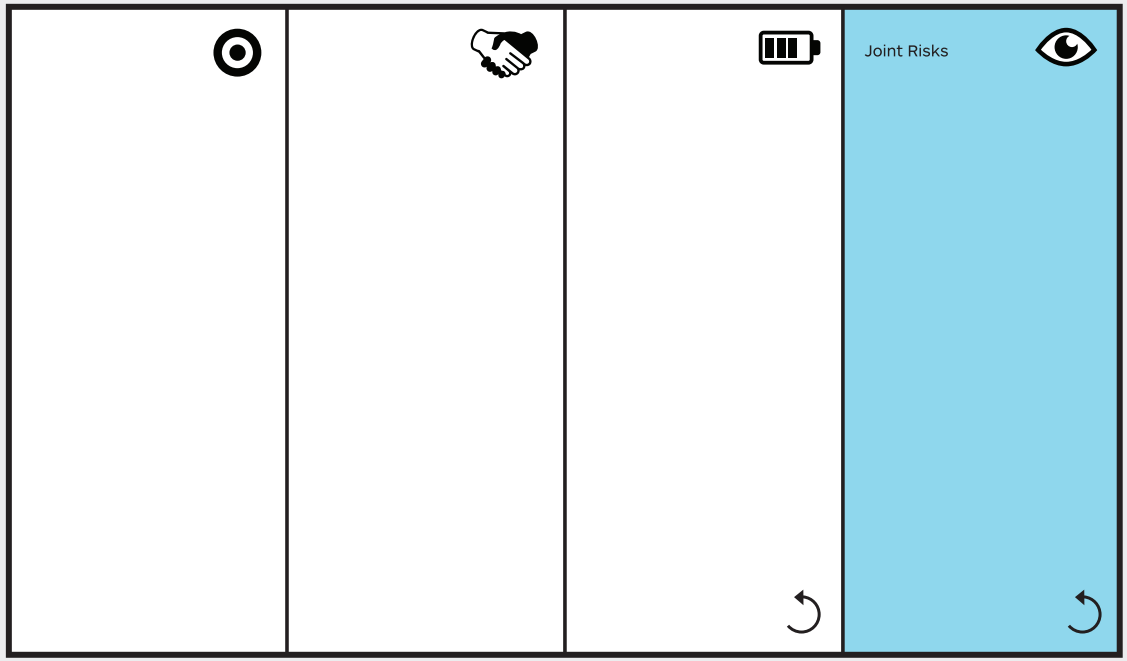
Resources checklist

- ☐ People: such as staffing, working hours, skills (technical, social), training, motivation
- ☐ Equipment and tools: such as office desks, meeting rooms, furniture, vehicles, machines
- ☐ Financial: such as budgets, cash, credit
- ☐ Materials: such as raw materials, supplies
- ☐ Technology: such as applications, computers, online services, network infrastructure needs
- ☐ Information: such as documents, data, access rights
- ☐ Legal: such as copyrights, patents, permits, contracts
- ☐ Organizational: such as processes, internal support, decisions

Joint Risks

What can prevent us from succeeding?

Team Alignment Map



I told you we were going too fast.

What Are Joint Risks?

Risk-free projects deliver… nothing. All projects carry risks related to their inherent degree of uncertainty. Risks are events that, if they occur, create unwanted obstacles. These obstacles make it more difficult for the team to achieve the mission. They can negatively impact the costs, the deadlines or quality of the deliverables, and even damage personal relationships. In the worst-case scenario, a risk that occurs can cause the entire project and team to fail.

The Team Alignment Map helps reduce project risk in three main steps:

1. Risk identification
   By filling in the joint risks column

2. Risk analysis
   By discussing the risk exposure of each entry

3. Risk mitigation
   By performing a backward pass
   (please read p. 88–89)

Risk management discussions matter: they increase the team's resilience — hence the likelihood of achieving the mission successfully.

+
Risk exposure

An easy technique is to mark risk exposure with a score or letter somewhere in the note.

For example: H = High, M = Medium, L = Low

(risk exposure = risk likelihood x risk impact)

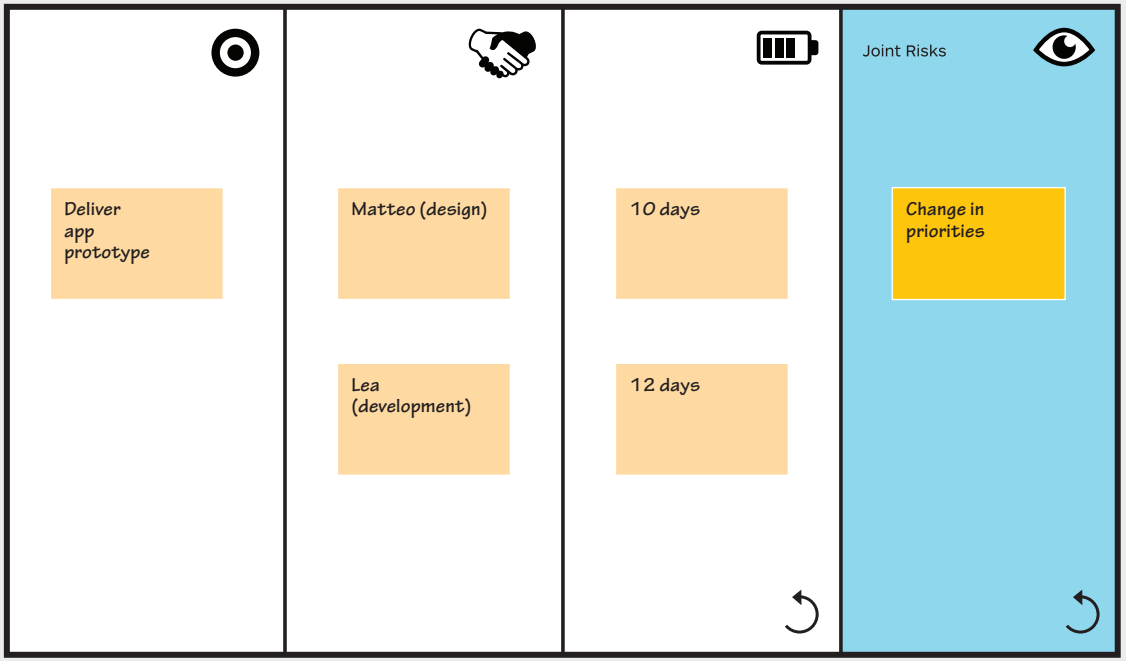
+
Professional risk management

The TAM is designed for on-the-fly rapid risk management; it is not a substitute for in-depth risk analysis and management tools. Please refer to professional techniques in that case.

Search keywords: risk management, risk management process, risk management tools.

Joint risks help the team anticipate and fix potential problems proactively.

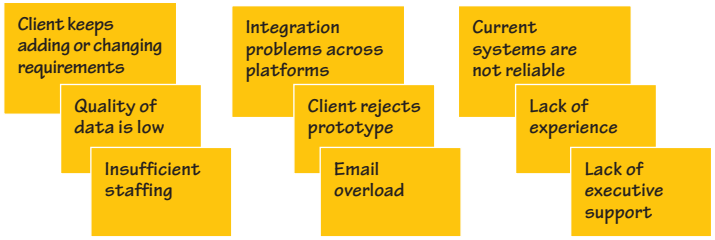
Team Alignment Map



Ask

- **What can prevent us from succeeding?**
- What might go wrong?
- What's our worst-case scenario?
- What are problems/threats/dangers/ side effects in achieving our objectives?
- Are there any particular fears/objections?
- What would make us consider a plan B?

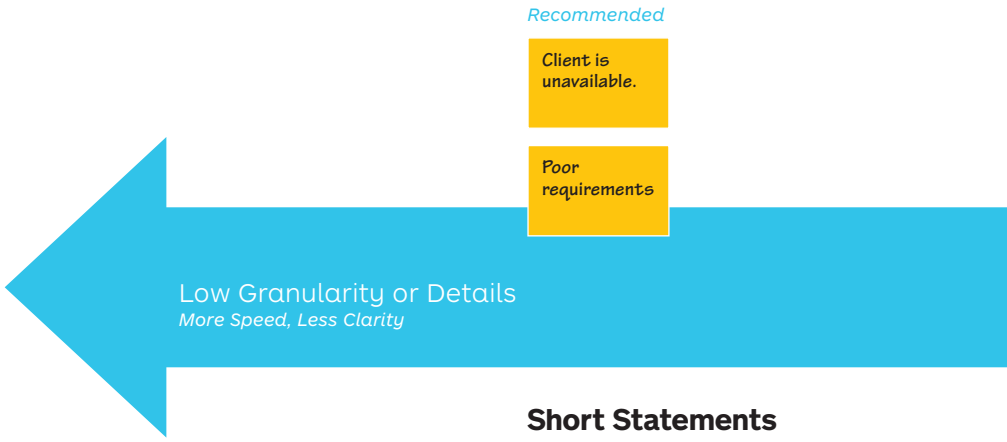
Examples



Examples of Joint Risks

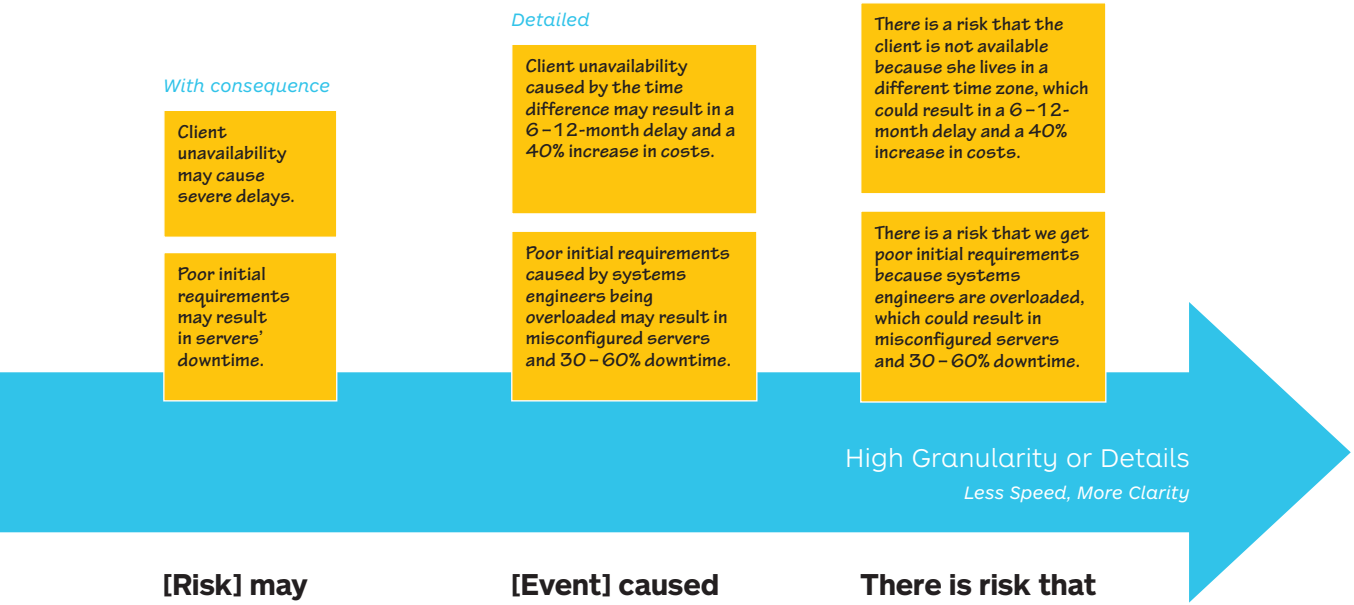
When describing risks, pragmatism should prevail.

At one extreme, so many things can possibly go wrong that a team can spend more time describing risks accurately than working to achieve the mission. At the other extreme, overoptimism, doing nothing in terms of risk identification, may cause the project to fail for easily avoidable reasons. A compromise is to describe risks succinctly, and detail only those with the highest risk exposure.



Short Statements

A short statement is better than no risk identification at all. This is the spirit of assessing risks with the Team Alignment Map.



[Risk] may [Consequence]

[Event] caused by [Cause/s] may result in [Quantifiable consequence/s on joint objectives]

There is risk that [Event] because [Cause/s], which could result in [Quantifiable consequence/s on joint objectives]

+

Risks checklist

- ☐ Internal: such as risks caused by the team itself, mistakes, defects, lack of preparation, lack of skills, quality of deliverables, miscommunication, staffing, roles, conflict, etc.
- ☐ Equipment: such as risks caused by technical problems, products and services used by the team, insufficient quality of tools, building, etc.
- ☐ Organizational: such as risks caused by management and other teams in the same organization, lack of support, politics, logistics, funding, etc.
- ☐ External: such as risks caused by clients, end users, suppliers, regulatory problems, financial markets, weather conditions, etc.

+

The templates on the right are more formal and describe risks in much more detail. They do, however, significantly increase the effort of alignment. To avoid discouraging the team, favor short statements such as presented on the left and use these detailed templates as additional guides for the discussion. If necessary, switch to professional risk management tools.

1.2
Planning Who Does What with the Team Alignment Map (Planning Mode)

Start with a forward pass to create the plan,
then make a backward pass to lower any risks.

Forward and Backward Pass

Planning with the Team Alignment Map is a two-step process.

1,2,3,4,5
The Forward Pass

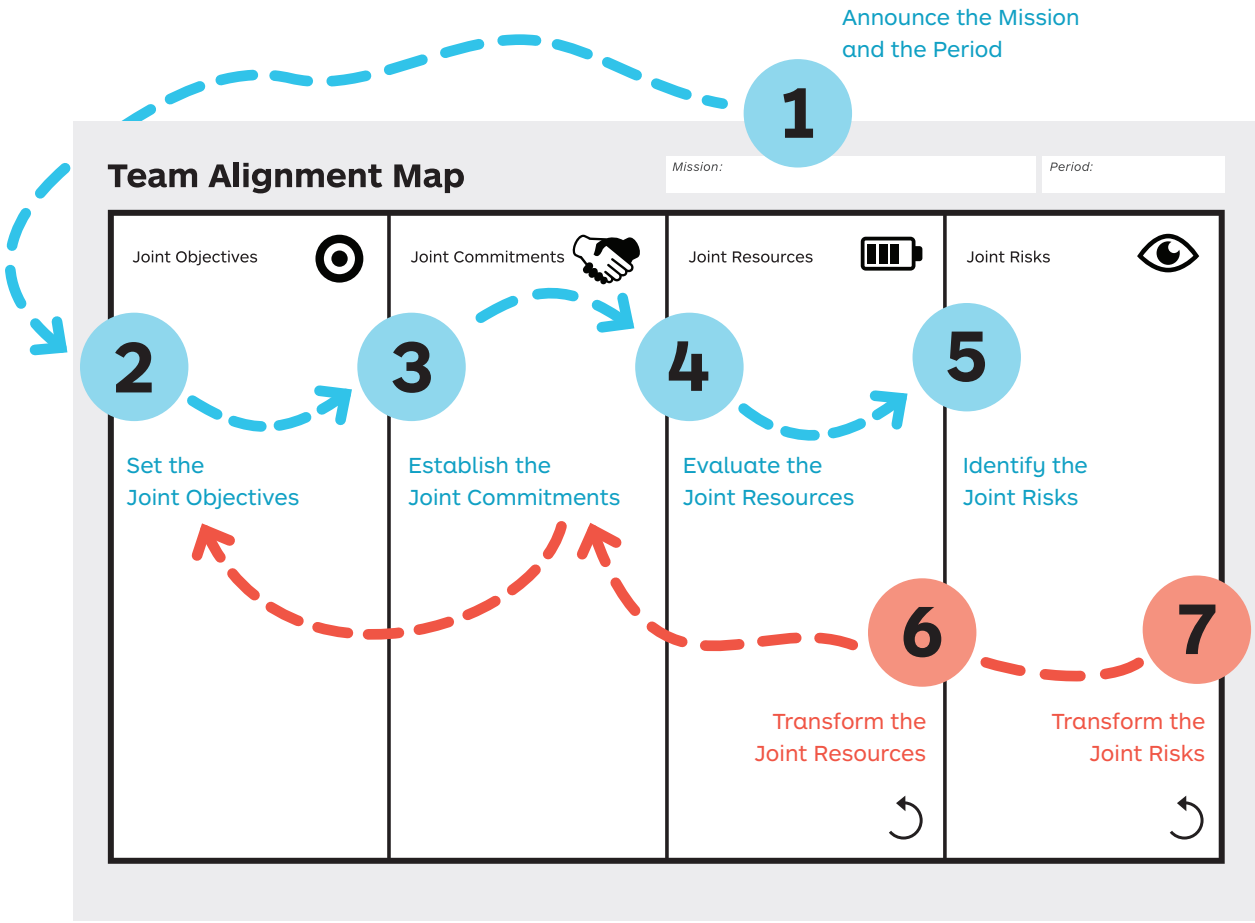
The first part of the process, called the forward pass, consists of planning together. Participants describe what is needed to collaborate effectively by filling in each column in a logical order from left to right. This sets a big picture, both in terms of expectations and problems, on which participants can reflect to increase their chances of success.

The forward pass starts bringing everyone together as a real team. Team members jointly consider each other's contributions and needs, and common understanding develops.

6,7
The Backward Pass

The second part is called the backward pass and is aimed at reducing the level of execution risk. Practically speaking, this part consists of removing as much content as possible from the last two columns. This happens by creating, adapting, and removing content from the rest of the map. In other words, latent problems, such as missing resources and open risks, are transformed into new objectives and new commitments.

Fixing and removing problems visually, together, gives a sense of progression. Motivation and engagement increase as participants see that the risks they described disappear because they are properly addressed. This also allows confirmation of the mission and the period, at the very end of the backward pass.

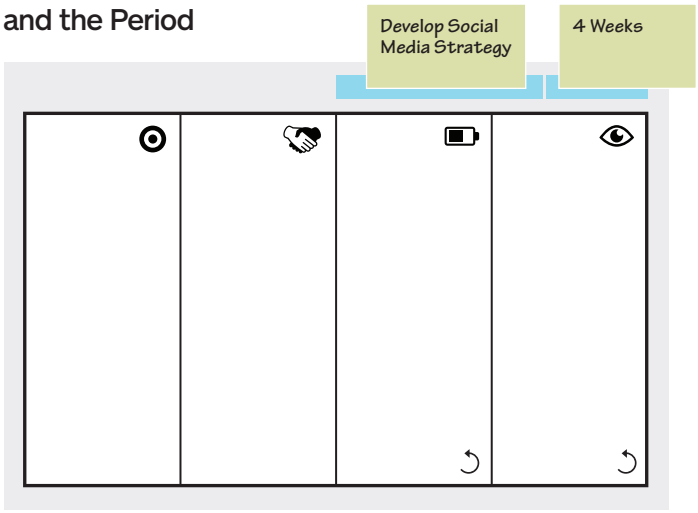

Announce the Mission
and the Period
1
Team Alignment Map
Mission:
Period:
Joint Objectives
Joint Commitments
Joint Resources
Joint Risks
2
3
4
5
Set the
Joint Objectives
Establish the
Joint Commitments
Evaluate the
Joint Resources
Identify the
Joint Risks
6
7
Transform the
Joint Resources
Transform the
Joint Risks

Example at Work

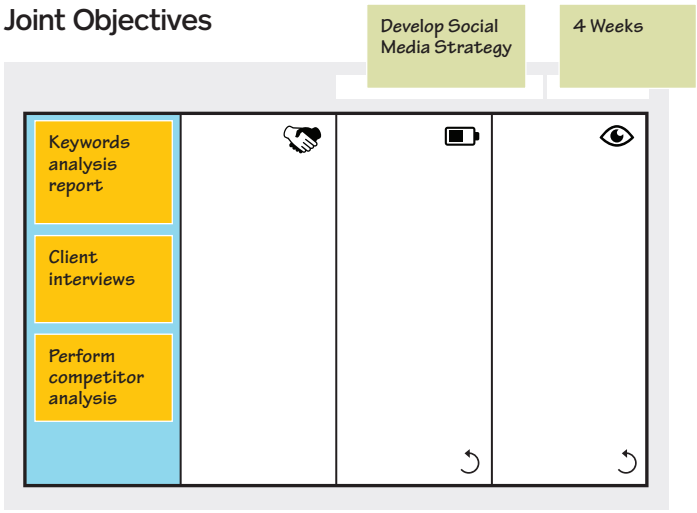
The Forward Pass
Develop a Social Media Strategy

Honora, Pablo, Matteo, Tess, and Lou work for a communications agency. Their mission is to develop a social media strategy for an important client in record time. They decide to align with the Team Alignment Map and here is the result of the forward and the backward pass.

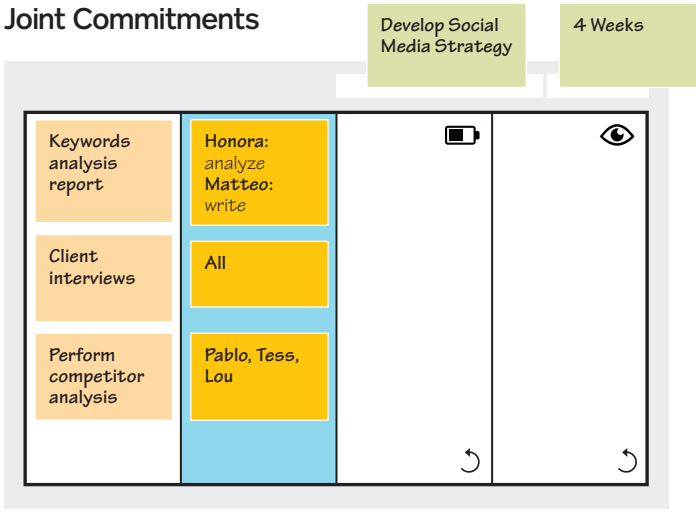
1
Announce the Mission and the Period



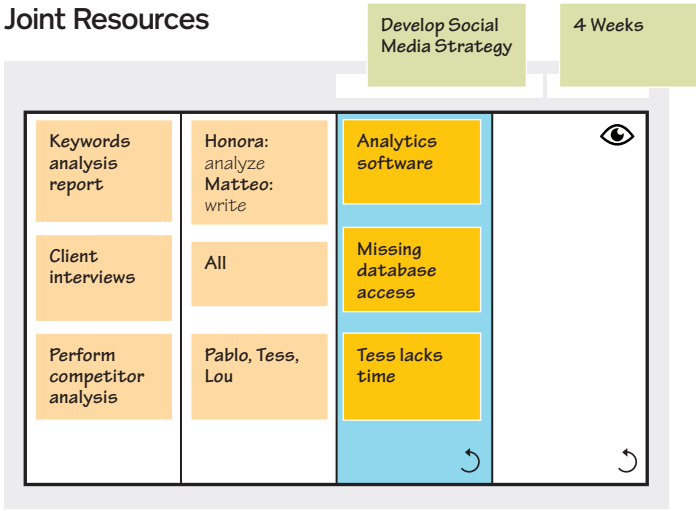
2
Set the Joint Objectives



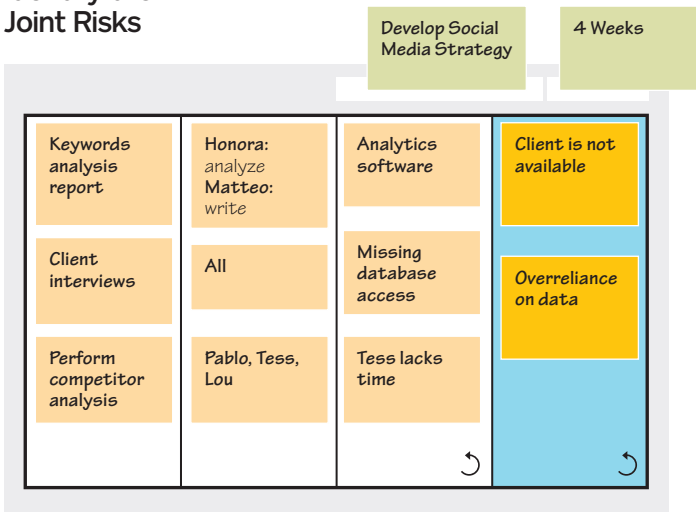
3
Establish the Joint Commitments



4
Evaluate the Joint Resources



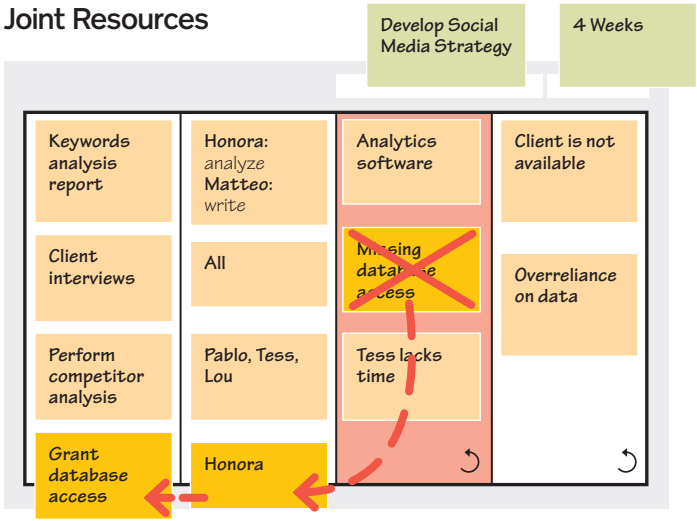
5
Identify the Joint Risks



Example at Work

The Backward Pass
Develop a Social Media Strategy

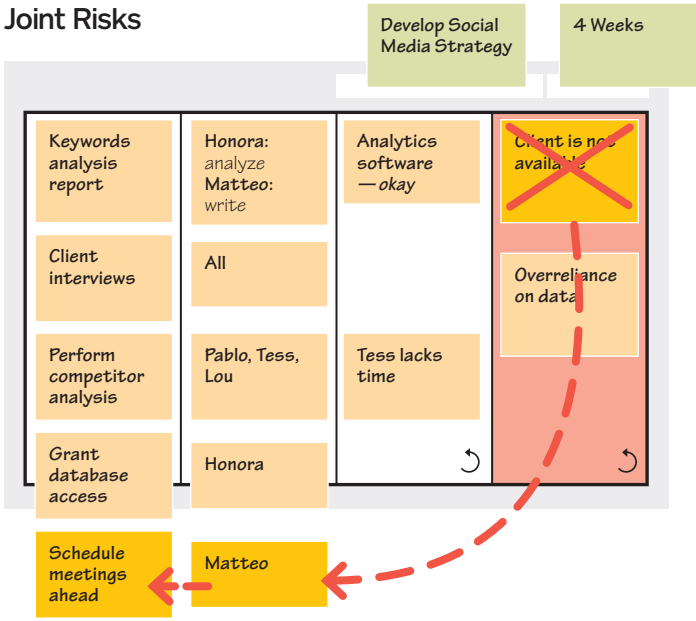
6
Transform the Joint Resources



- Analytics software: The analytics software is available, the note is checked, and there's nothing special to do.
- Missing database access: Honora knows how to grant database access to the team, so she creates a new objective and a new commitment. The missing resource is removed from the column.
- Tess lacks time: A solution must still be found, so the element remains in this column.

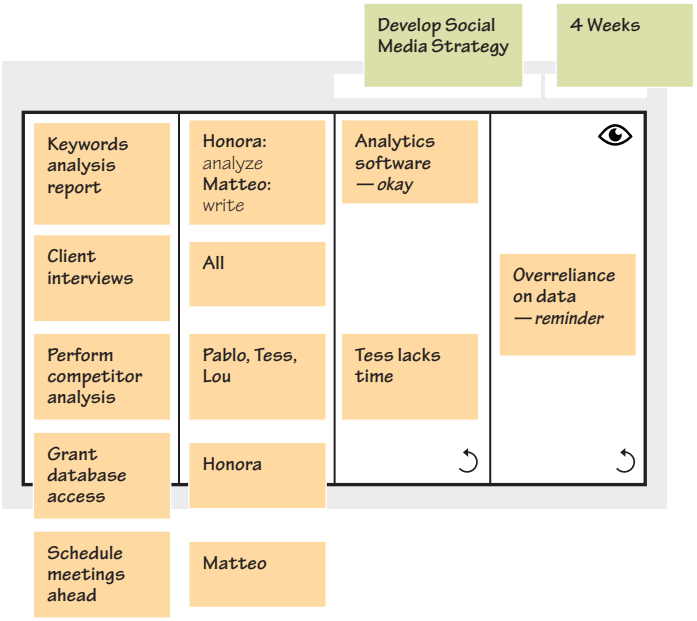
7

Transform the Joint Risks



- Client is not available: There is a risk that the client is not available for the interviews, so Matteo commits to scheduling all meetings ahead of time. The risk is removed from the column.
- Overreliance on data: Nothing really can be done here except to keep that risk in mind. The team agrees to leave that risk as a reminder.

Team Validation



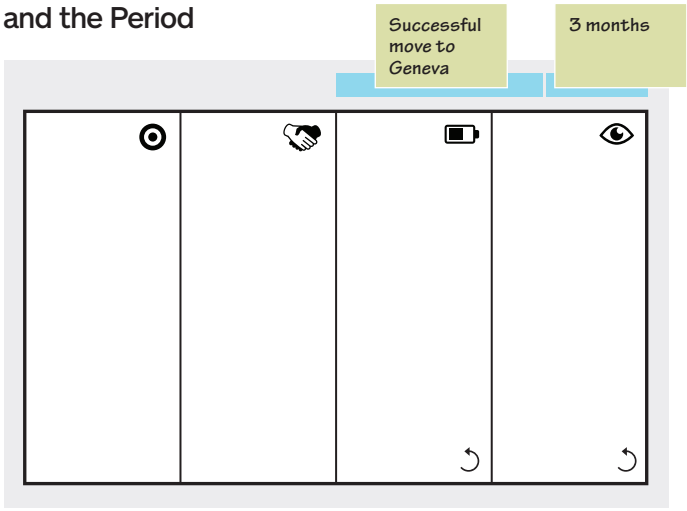
- The team agrees that work can start.
- A solution still needs to be found to free up time for Tess.
- Everyone knows it, which makes a big difference for her.

Example at Home

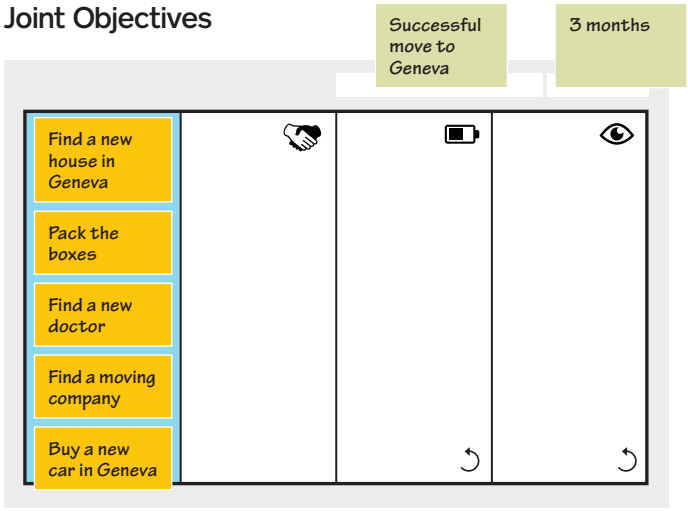
The Forward Pass
Successful Move to Geneva

Angela works for an international organization and she has just been relocated to its headquarters in Geneva, Switzerland. Together with her husband, Giuseppe, and their children, Renato, Manu, and Lydia, they decide to align to ensure a successful move. Here is what they discuss during the forward and the backward passes.

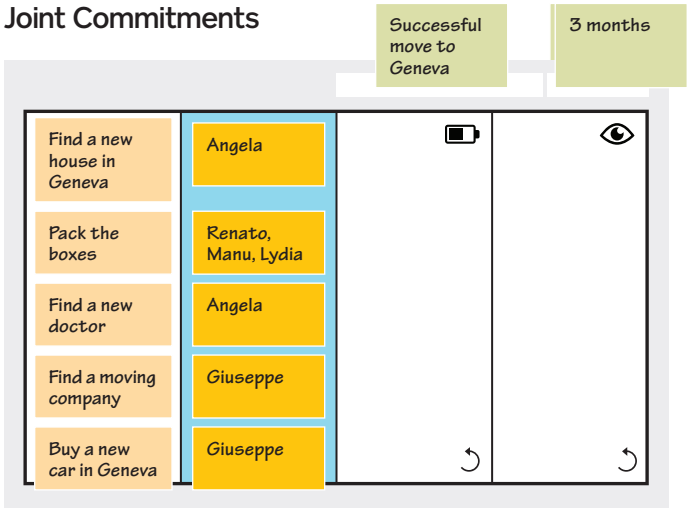
1 Announce the Mission and the Period



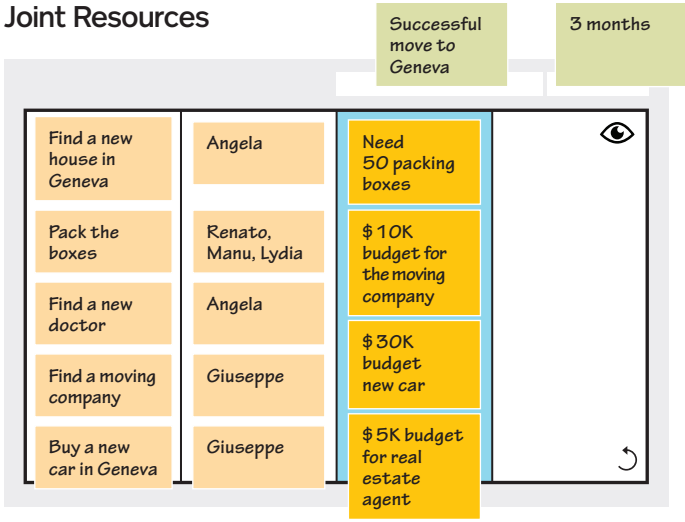
2 Set the Joint Objectives



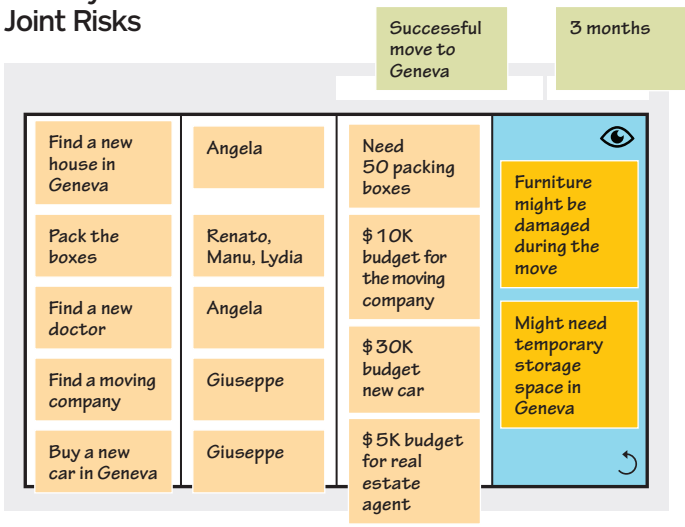
3
Establish the Joint Commitments



4
Evaluate the Joint Resources



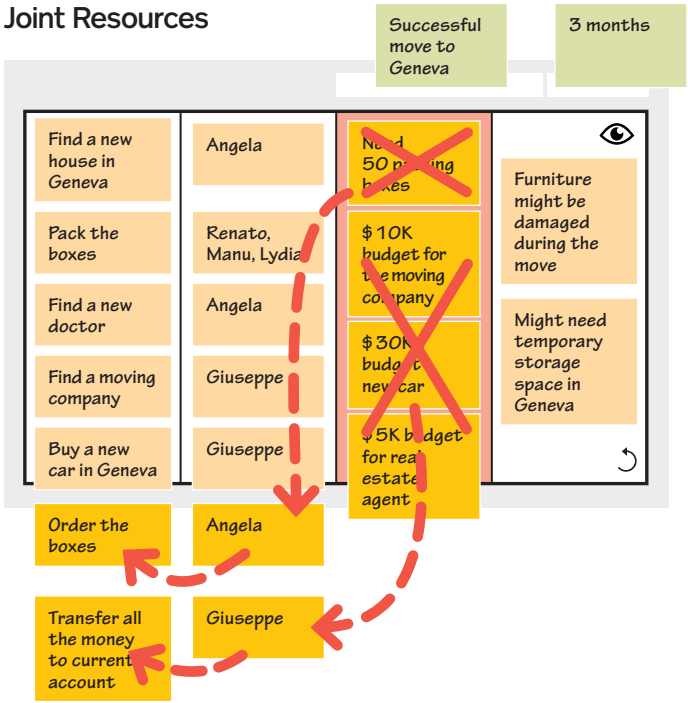
5
Identify the Joint Risks



Example at Home

The Backward Pass
Successful Move to Geneva

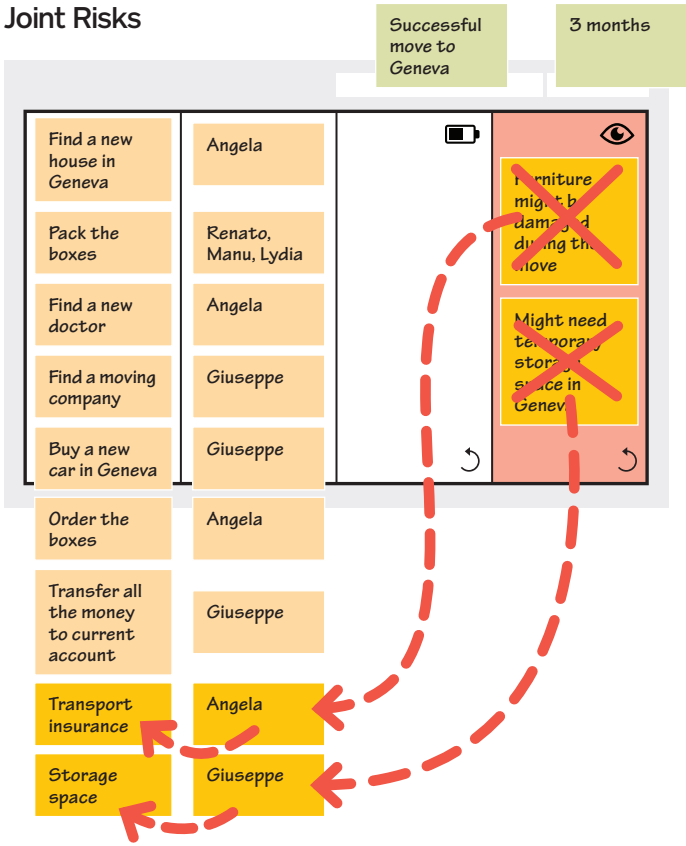
6
Transform the Joint Resources



- Need 50 packing boxes: Angela will order the boxes today.
- $45K total budget (for the moving company, new car, real estate agent): Giuseppe will ensure that the money is available in the current bank account.

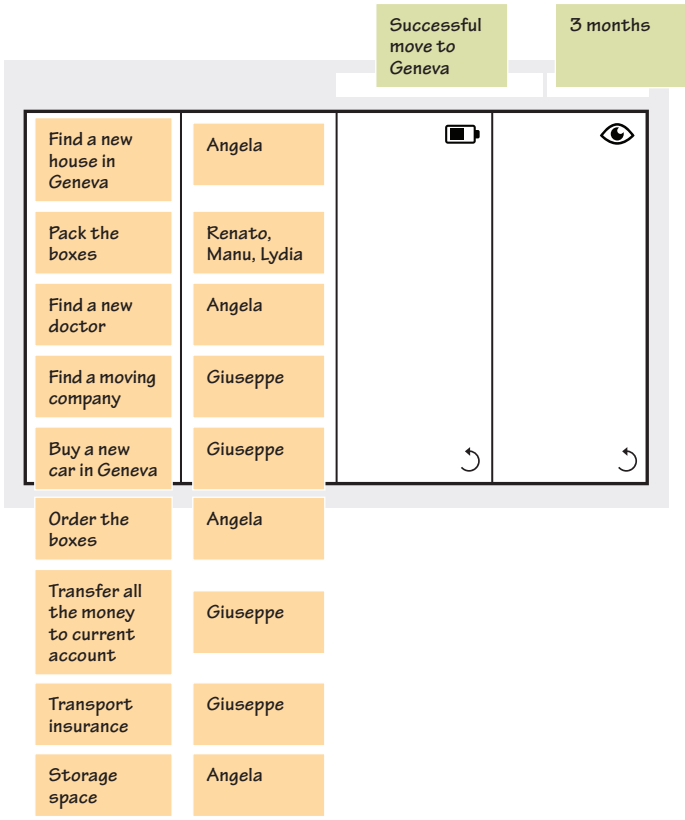
7

Transform the Joint Risks



- Furniture might be damaged during transportation: Angela will take out transport insurance with their usual insurance company.
- Might need temporary storage space in Geneva: Giuseppe will contact the HR department for a recommendation and ensure that sufficient storage space is available.

Team Validation



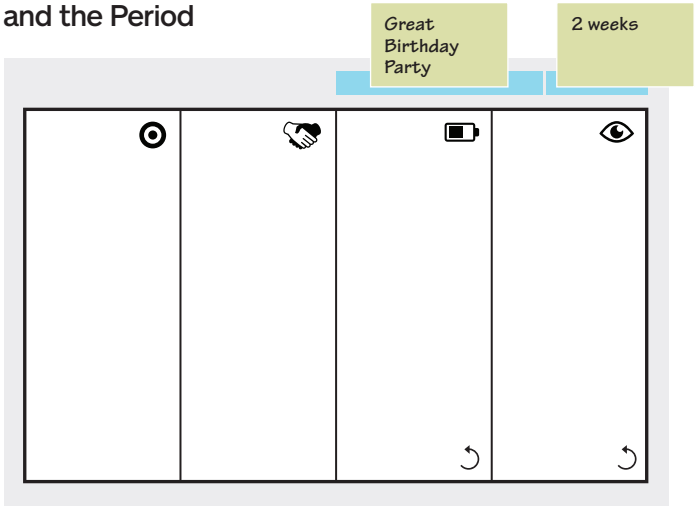
- Everyone agrees and gets to work to make a successful move.

Example with Friends

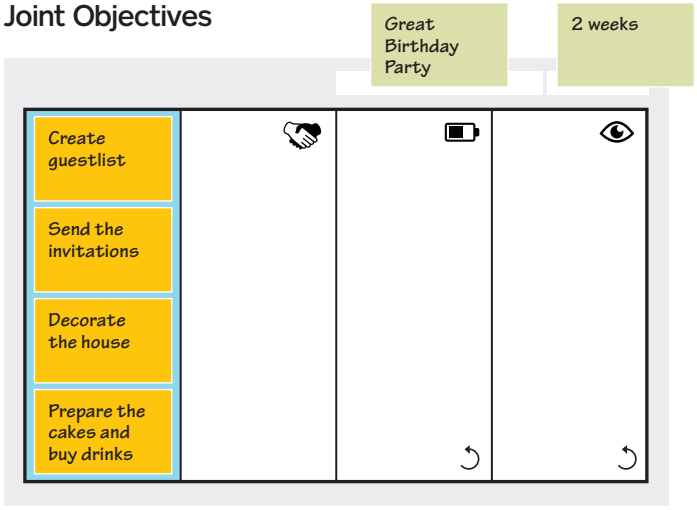
The Forward Pass
A Great Birthday Party

Louise's birthday is approaching, and her parents, Mathilde and Bernard, want to organize a beautiful party. Her best friend, Thomas, also wants to help. Here is how they teamed up to do a forward and a backward pass.

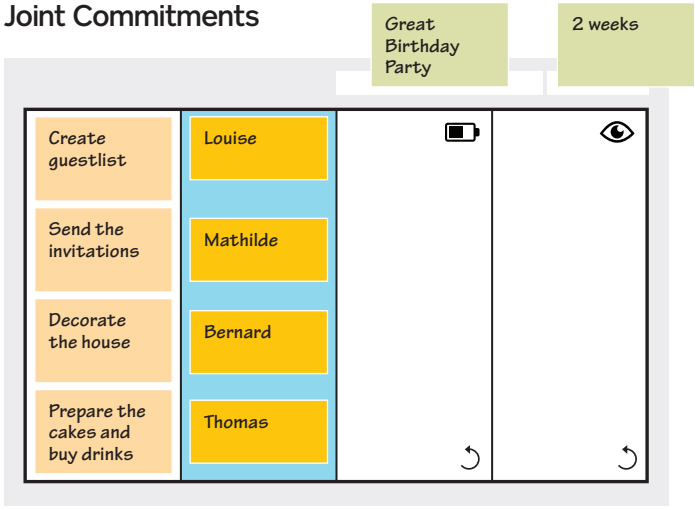
1
Announce the Mission and the Period



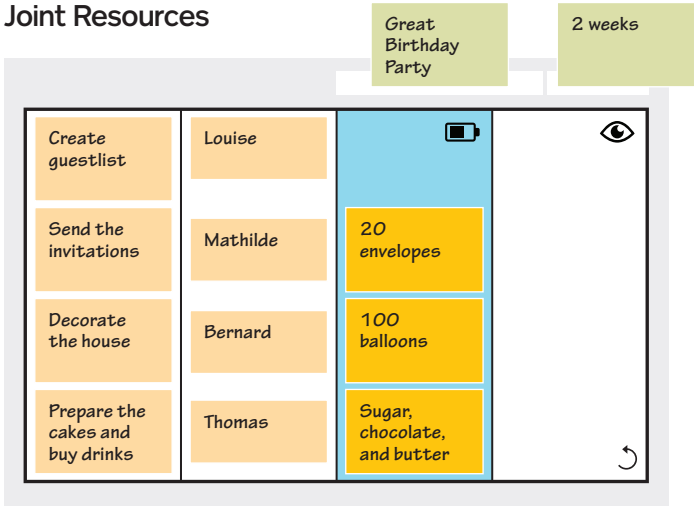
2
Set the Joint Objectives



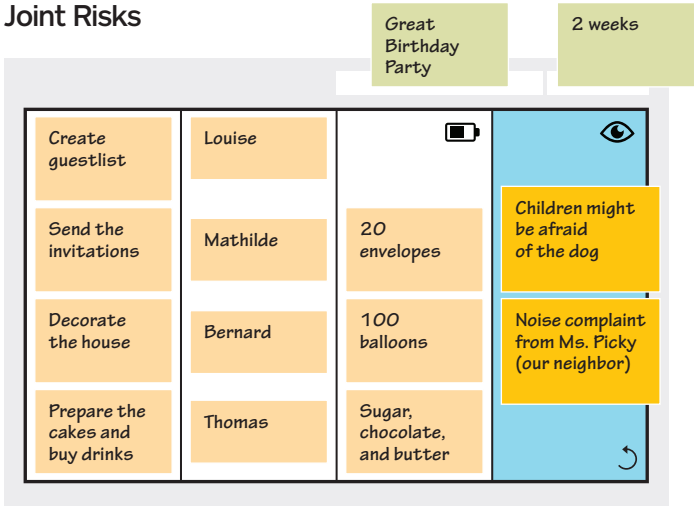
3
Establish the Joint Commitments



4
Evaluate the Joint Resources



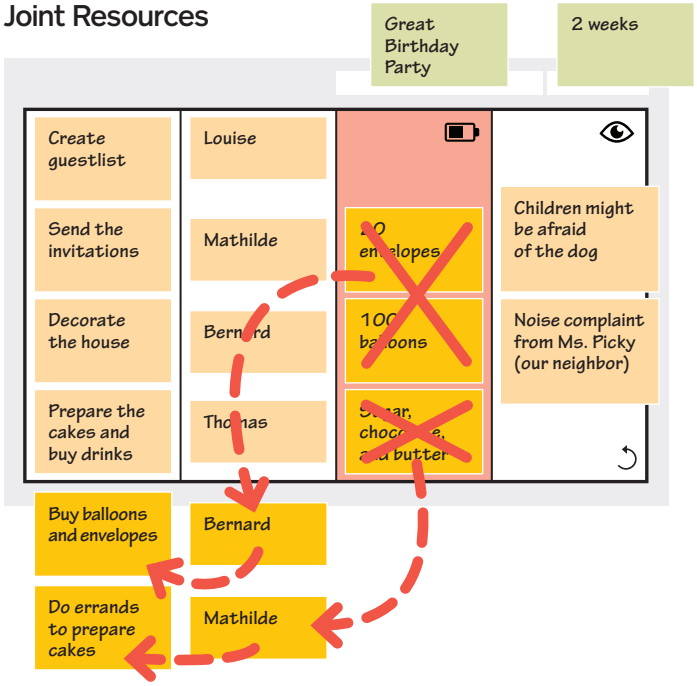
5
Identify the Joint Risks



Example with Friends

The Backward Pass
A Great Birthday Party

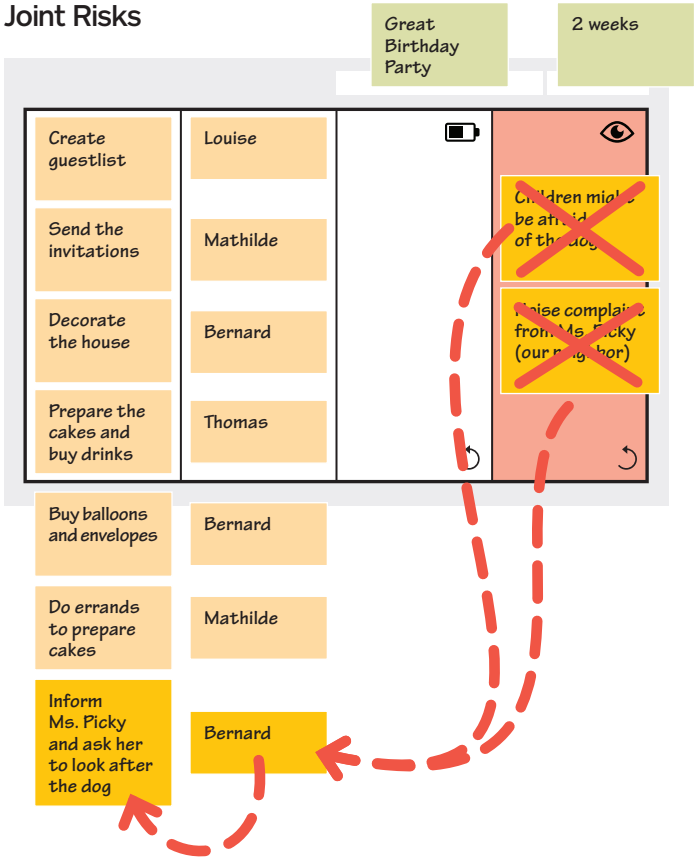
6
Transform the Joint Resources



- 20 envelopes and 100 balloons: Bernard will take care of this.
- Sugar, chocolate, and butter: Mathilde must go to the pharmacy and she will stop on the way back to buy the ingredients.

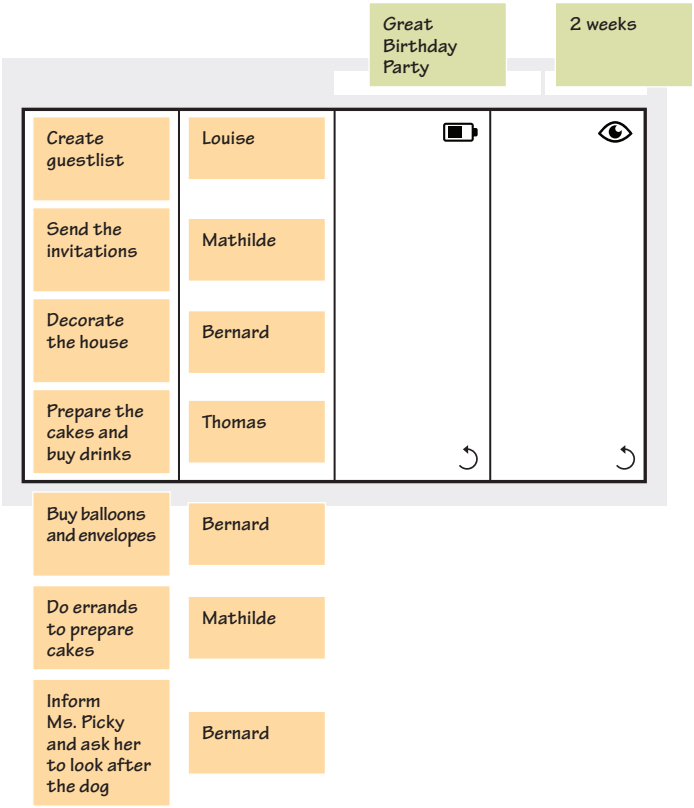
7

Transform the Joint Risks



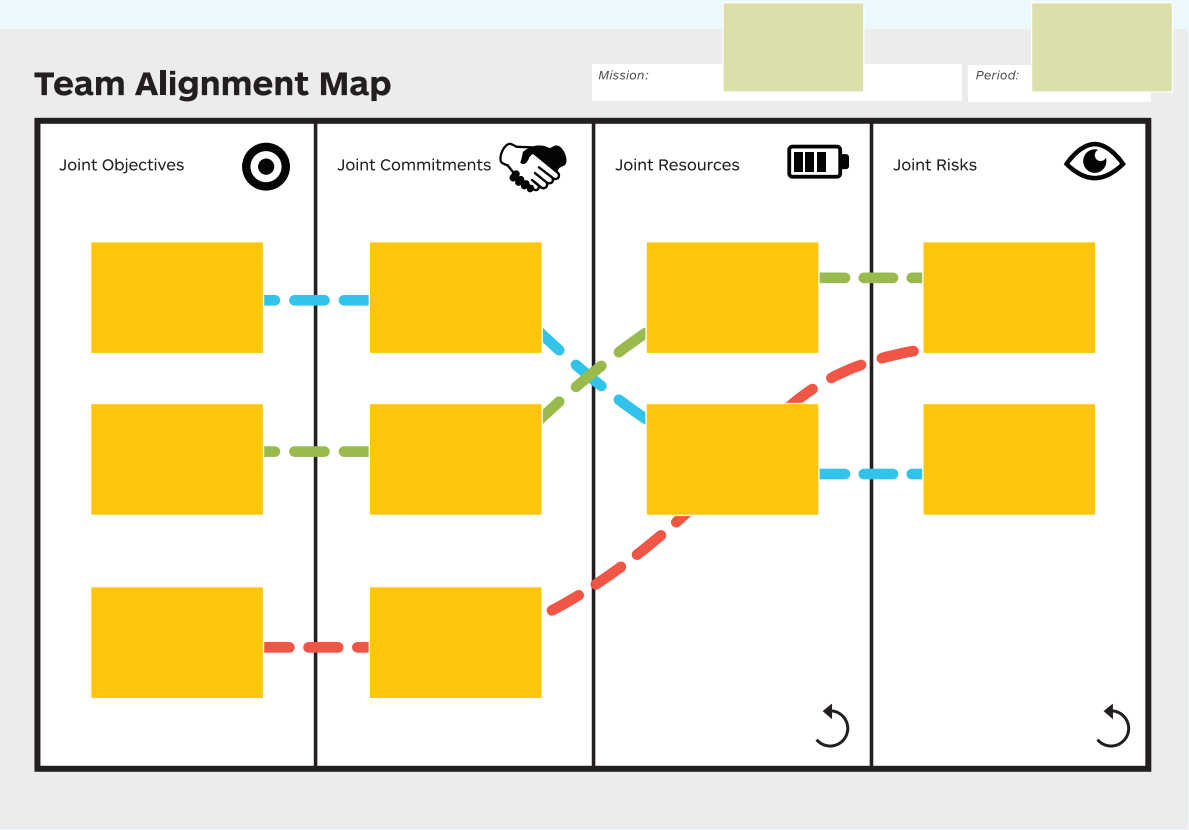
- Children might be afraid of the dog and Ms. Picky might complain about the noise: Bernard will inform Mrs. Picky immediately and ask her to keep the dog the afternoon of the party.

Team Validation



- Everyone agrees and they start preparing a great birthday party.

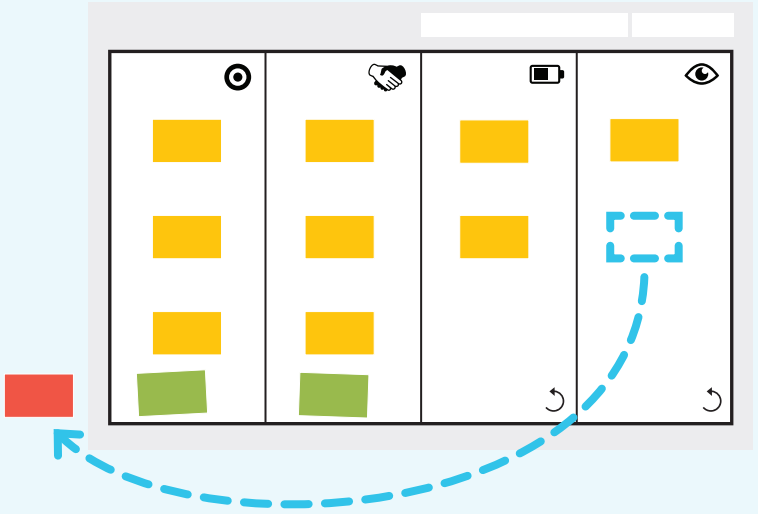
Pro Tips



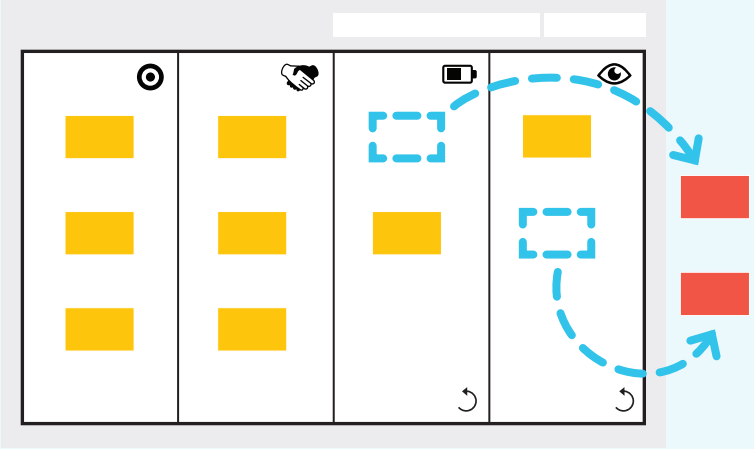
Visualizing Relationships
Simply draw lines to visualize relationships.

Removed Items
What to do with the joint risks and joint resources removed during the backward pass?

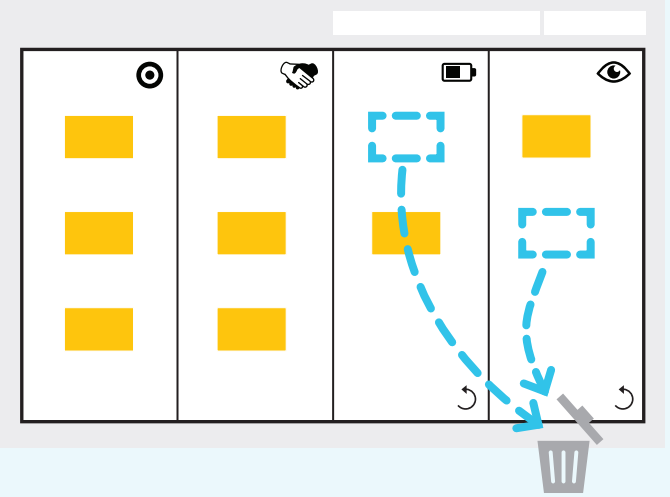
Option 1
On the left: in front of the new objectives



Option 2
On the right on the wall



Option 3
Trash



1.3
Keeping Team Members on Track (Assessment Mode)

Use the Team Alignment Map to assess team readiness or address ongoing problems.


4
10
6
9

How to Use the Team Alignment Map to Assess Projects and Teams

The Team Alignment Map can easily turn into an alert system that reveals blind spots and prevents the accumulation of small perception gaps from becoming big problems.

Rapid visual assessments with the TAM can help the team ensure that minimal success requirements are met:

- Initially, to have a good project start.
- Later on, to remain on the right track.

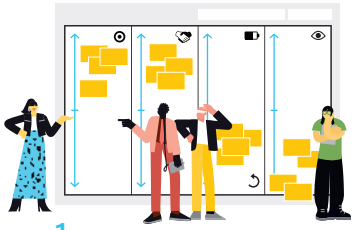
Too often we embark on projects where these minimal requirements are not met and collaborating turns into permanent crisis management. This happens when the team lacks preparation or when there are collaboration blind spots, i.e. when someone thinks he or she knows what others are thinking but is off base. Ensuring enough alignment from start to finish is essential to success, and with a rapid assessment the team can visualize the level of alignment and act early enough to avoid preventable problems.

Assessing consists of asking every team member if they think they can do their part successfully. This is done with a vote that can be anonymous if necessary. The image resulting from a vote is neutral, and is then interpreted as a team; repair actions are undertaken if the alignment is insufficient.

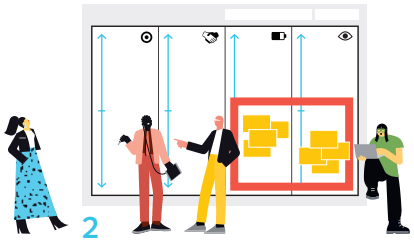
To start assessing, draw four horizontal sliders in each column and add the following values to each slider (starting from the bottom of the map) as illustrated in the figure on the next page:

1. Joint objectives: unclear, neutral, clear
2. Joint commitments: implicit, neutral, explicit
3. Joint resources: missing, neutral, available
4. Joint risks: underestimated, neutral, under control

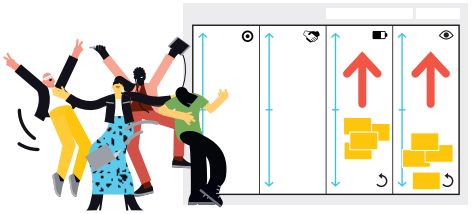
Then follow by applying this basic three-step process:



1
Reveal
Participants vote individually and acknowledge the result collectively.



2
Reflect
Problem areas are identified and analyzed as a team.

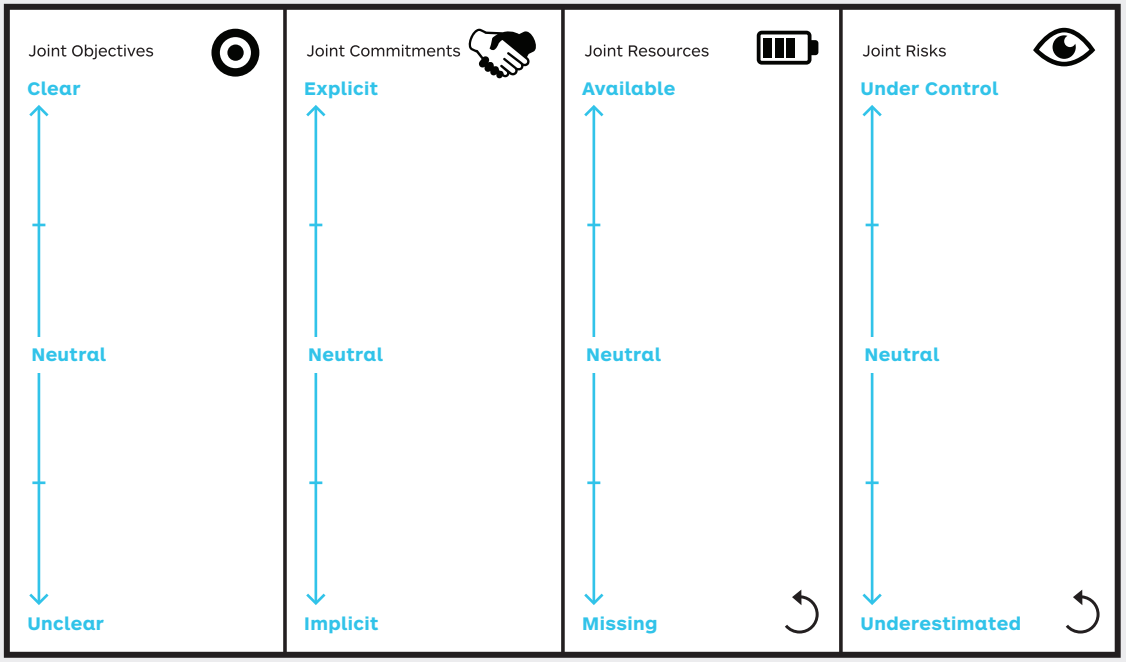


3
Repair
Decisions are made to fix the problems and are validated together.

Team Alignment Map

Mission:

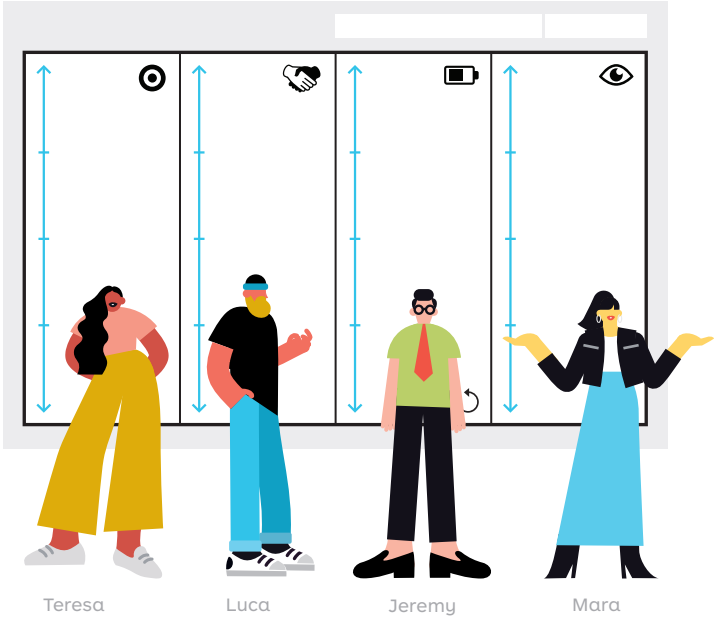
Period:



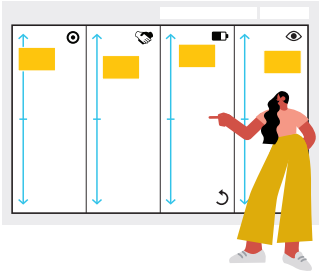
Step 1: Reveal

Team members vote to reveal whether they believe they can contribute successfully.

1
Announce the topic
What's the challenge?

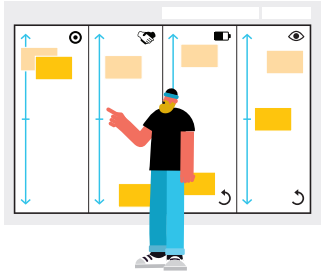


2
Vote individually
Do you think you can do your part?



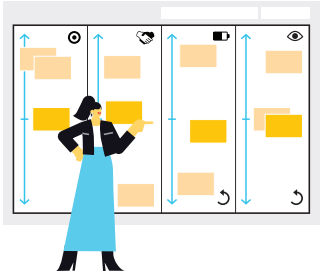
Teresa thinks:

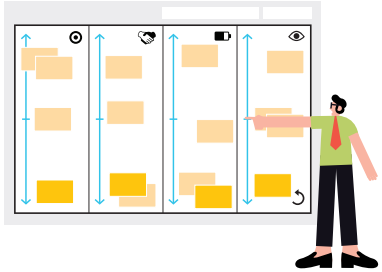
- Joint objectives: what we intend to achieve together is clear.
- Joint commitments: we have explicitly discussed each one of our role and commitments.
- Joint resources: we have the resources we need to do our jobs.
- Joint risks: the risks we face are under control.



Luca thinks:

- Joint objectives: what we intend to achieve together is clear.
- Joint commitments: our roles are implicit; mutual commitments have not been discussed.
- Joint resources: we miss critical resources to do our jobs.
- Joint risks: some risks are under control and some are underestimated.





Mara thinks:

- Joint objectives: some objectives are clear and some are not.
- Joint commitments: some commitments have been discussed and some are implicit.
- Joint resources: some resources are available but are not sufficient to do our jobs.
- Joint risks: some risks are under control and some are underestimated.

Jeremy thinks:

- Joint objectives: what we intend to achieve together is unclear; I'm confused.
- Joint commitments: our roles are implicit; mutual commitments have not been discussed.
- Joint resources: we miss critical resources to do our jobs.
- Joint risks: the risks we face are underestimated.

3
Acknowledge the result

What's the collective result?

The "aha" moment. The display of the vote triggers group awareness and problem recognition.

Step 2: Reflect

Identify perception gaps and discuss to understand the causes.

The vertical distribution of votes helps the team understand whether each member is in a position to contribute successfully and the level of alignment in the team, i.e. if team members share the same perception.

The ideal vote occurs when all votes are in the green zone. When a participant enters his or her entire vote into the green zone, he or she reports that:

1. Objectives are clear
2. Commitments have been explicitly agreed
3. Resources are available to do his or her work
4. Risks are under control

In other words, a vote in the green zone indicates that the minimum requirements are met for a successful personal contribution. When the whole team votes in the same way, team members are positively aligned and the team is likely on the path to success because everyone thinks they can successfully contribute.

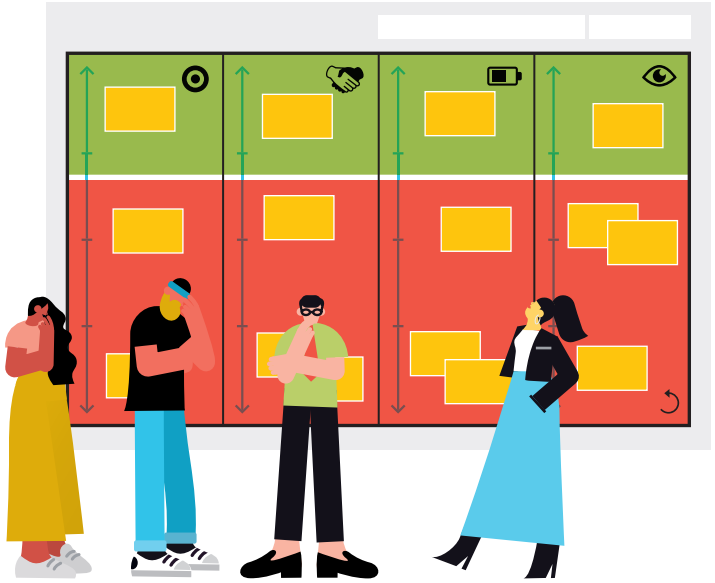
The team can also be negatively aligned, when the majority of votes are concentrated at the bottom of the red zone. This means that all team members express that they cannot contribute at all. Any other voting pattern in the red zone signals a problem for one or more members, that something is unclear or missing and that should be addressed rapidly.

To summarize, the vertical position of votes shows whether a requirement is met or not; the higher the position the better. A concentration of votes illustrates alignment in the team, whereas dispersion indicates misalignment. The more votes are concentrated at the top, in the green zone, the higher the chances of success. The more votes are dispersed or concentrated at the bottom, in the red zone, the more problems are likely to appear while working together. In this case, better stop, talk, and take repair actions before it's too late.

4

Interpret the vote

Surprised or not surprised?
Is it more positive or negative for us?
Where are the problems?



Green zone

Higher likelihood of success

(all votes in the top third of the map)

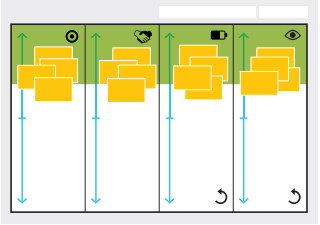
It's okay when the majority of votes is in the green zone. The team is aligned and everyone is ready to perform. No need to discuss further; it's time to get back to work.

Red zone

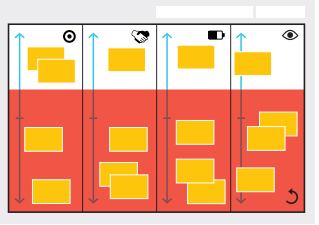
Lower likelihood of success

(one or more votes in the bottom two-thirds of the sliders)

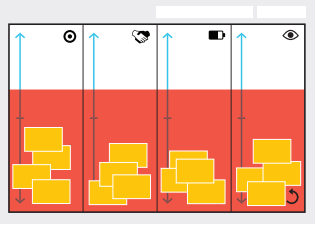
Problems are imminent when one or more votes are in the red zone. The requirements for a successful collaboration are not met for one or more team members. Better discuss to understand where the problems are and how to fix them before it's too late.



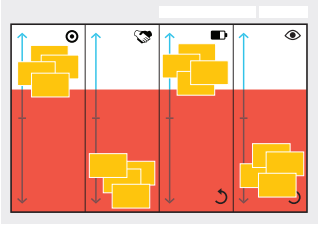
Example 1: Go ahead
This is the ideal vote. The team is positively aligned and confident that everyone can contribute successfully.



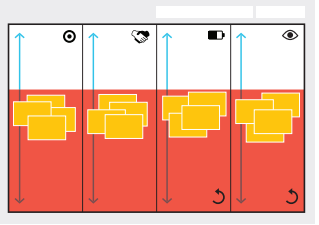
Example 2: Stop and talk
The four variables must be discussed and clarified. Some team members think that some requirements are okay (votes at the top), others that nothing is okay (votes at the bottom). This dispersion illustrates the highest level of misalignment.



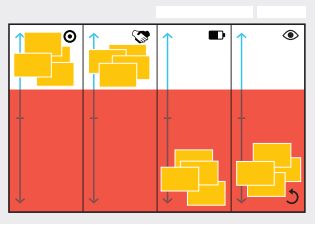
Example 3: Stop and talk
The four variables must be discussed. The team is negatively aligned: all members believe that nothing is okay.



Example 4: Stop and talk
The team needs to discuss why commitments and risks are so low. For all team members, the joint commitments are unclear and joint risks are underestimated. Joint objectives appear clear and resources are available for the whole team.



Example 5: Stop and talk
The four variables must be urgently discussed. All team members vote neutral. This is a typical vote for nonpriority projects or when participants are disengaged or prefer not to speak up.

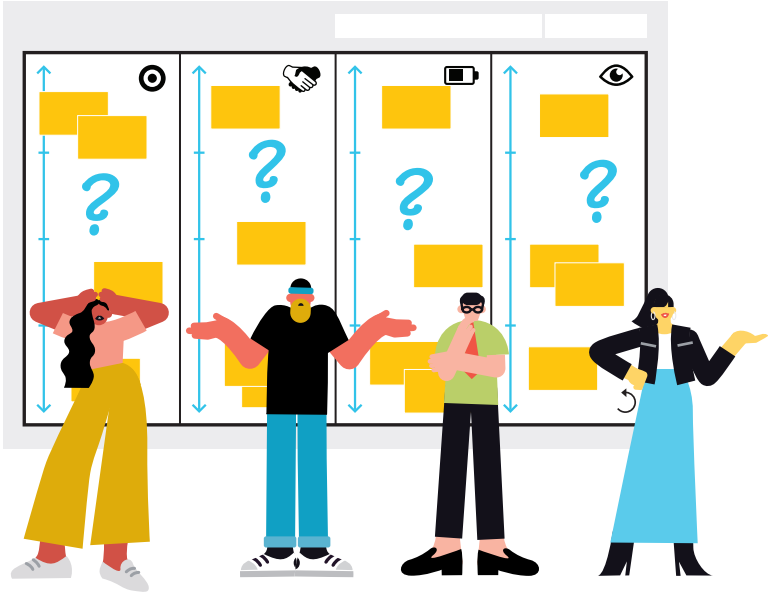


Example 6: Stop and talk
The last two variables must be discussed. Joint objectives and joint commitments are clear, but there is a critical lack of resources and risks are somehow underestimated. This is a typical vote for teams in startups. The last two variables must be discussed.

5

Analyze the problems

What's causing the problems?
What causes the perception gaps?
What prevents that requirement from being in the green zone?



The objective of this step is to discuss the votes in the red zone and what causes the perception gaps—the trigger questions on the next page might help.

Discussion time may vary depending on the situation. For example, a problem with a missing resource, such as a software developer claiming three additional days of work, is quite simple to understand. Problems regarding unclear objectives, implicit commitments, or risks will need more time to be understood.

Trigger questions to analyze problems

These questions help spark collective thinking and dive deeper into possible issues. The following rule of thumb helps facilitate the analysis:

1. Ask a question
2. Listen to the answers
3. Summarize and share to validate understanding

High-level questions

What's your feeling about this vote?
What do you think is the problem?

Inquire deeper

Joint Objectives

- What are we supposed to achieve together, concretely?
- What will make our project a success?
- What are we supposed to deliver?
- What will the end result look like?
- What challenges do we have to address?
- What's the plan?

Joint Commitments

- Who will do what? With whom? For whom?
- What's everyone's role and responsibilities?
- What do we expect from each other, precisely?

Joint Resources

- What resources do we need?
- What is missing for everyone to do his or her part?

Joint Risks

- What can prevent us from succeeding?
- What's our worst-case scenario?
- What's our plan B?

Step 3: Repair

Repairing means taking concrete actions to ensure that the votes in the red zone are moved to the green zone in the next vote.

What causes problems is understood and it's time to redress the situation. Further explanations must be provided or decisions must be made. The resulting repair actions can vary considerably:

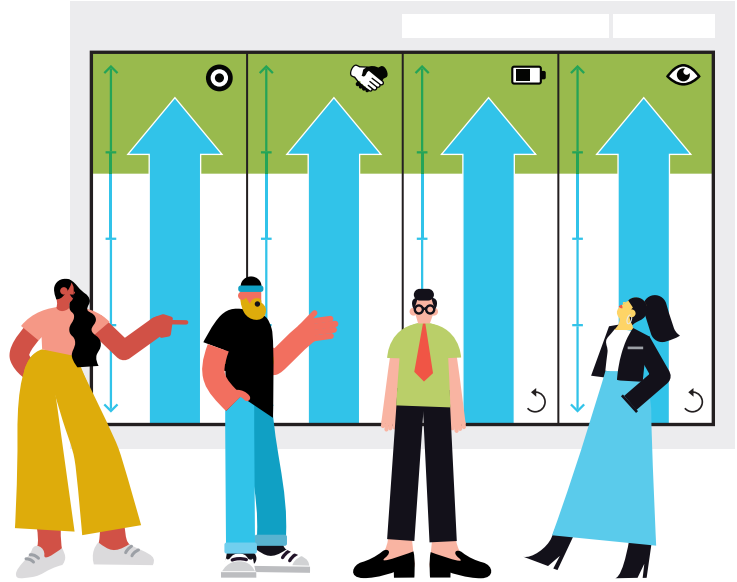
- Clarify or adapt something (mission, period, and the content of the four columns).
- Remove or add new content on the map.
- Make decisions outside the TAM, shift priorities, split the project into two or three projects, and so on.

As shown in 7, a final vote is conducted to validate the impact of the repair actions and to see if any problems remain. The assessment has been successful if the majority of votes is now in the green zone.

6

Decide and announce the repair actions

What concrete actions/measures should we take to redress the situation?
What can be done to get most of the votes in the green zone next time?



More questions for making decisions and acting

- So now what? What should we do, concretely?
- What actions must we take now? What's the priority?
- Where do we go from here? What do we decide?
- What are the immediate next steps?

+

Fixing the mission and period

- Clarify the mission
- Reframe the mission
- Review the scope
- Extend the period

+

Fixing the four variables

- Clarify
- Add
- Remove
- Adapt

+

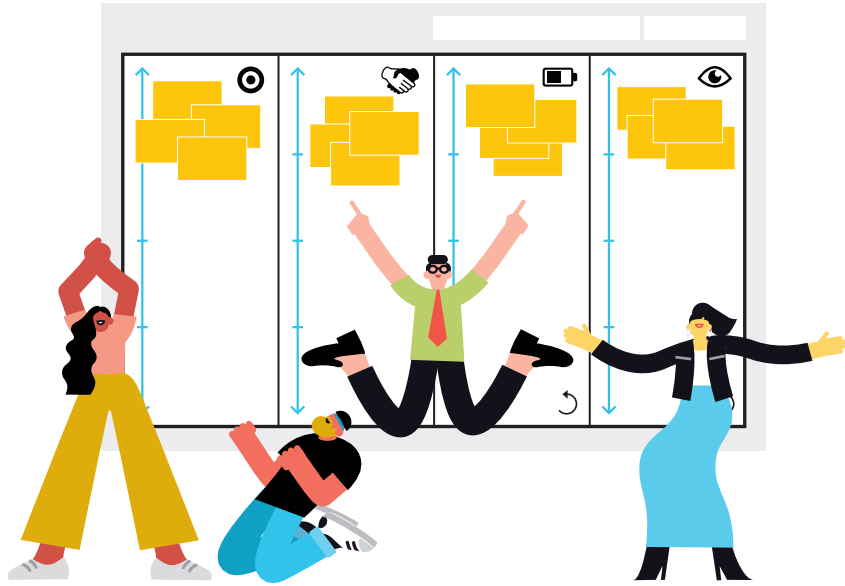
Fixing outside the TAM

- Change priorities
- Split the project into sub-projects
- Assign to a different team, etc.

7

Team Validation

Do you think you can do your part now?



The new votes are in the green zone: great job! The situation is corrected, and everyone can get back to work.

Should some votes remain in the red zone: unfortunately, some problems still remain. In this case pragmatism prevails: the team and/or the team lead decide whether to resume an analysis cycle or move forward.

When to Assess

There are two types of assessments: when the project is kicked off (more frequent) and after (less frequent). The need for alignment is greatest at the beginning of projects and decreases over time as team members accumulate common ground (see Dive Deeper, p. 252). But changes in context and information can create dangerous blind spots that can be addressed by making rapid ad hoc validations.

Readiness assessments
“Are we having a good start?”

Troubleshooting assessments
“Are we still on track?”

What?

- Are we ready to perform?
- Will every member deliver optimally?
- Shall we go or do we need to prepare more?
- What are our chances of success?

- Can every member still deliver optimally?
- Have any changes created harmful blind spots?
- Are we still on the path to success?

When?

- Weekly coordination meetings (10 minutes before the end of the meeting)
- Project initiation meetings (at the beginning or the middle of the meeting)

- Project execution meetings (10 minutes before the end of the meeting)
- On-demand meetings (at the beginning of the meeting)

How many?

More frequent
(until the actual kickoff)

- Daily
- Weekly
- On-demand

Less frequent
(after the actual kickoff)

- Monthly
- Quarterly
- Every semester
- On-demand

Case study
Healthcare company
500 employees

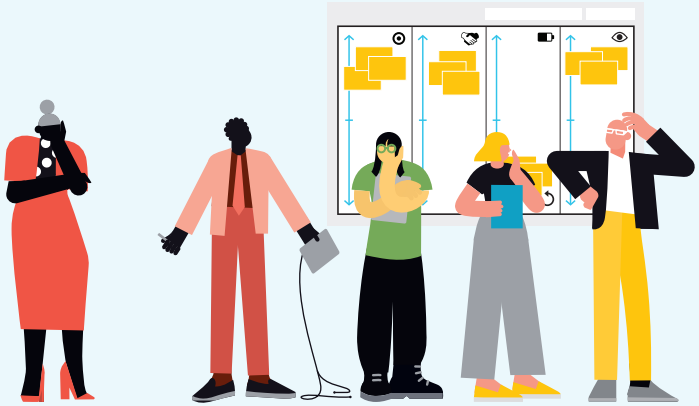
Will We Deliver on Time?

Simone is the regional boss of a mid-sized healthcare company. Her project managers manage five projects on average and complain about their work overload. Rumors are flying around that the customer relationship management (CRM) project, which ranks high in terms of business priorities, will not be delivering on time. Is there anything Simone should worry about?

1
Reveal

Simone organizes an on-demand trouble-shooting assessment to understand whether the project will be delivered on time or not. The team of four is invited and they vote. Results illustrate that there is a problem with joint resources. All team members agree that there are not enough resources to complete the work as expected.

Adapted from S. Mastrogiacomo, S. Missonier, and R. Bonazzi, "Talk Before It's Too Late: Reconsidering the Role of Conversation in Information Systems Project Management." Journal of Management Information Systems *31, no. 1 (2014): 47–78.*



2
Reflect

The team reflects: members report high work overloads, which results in a persistent lack of time to complete all their tasks and their inability to maintain the deadline. Further investigation leads Simone to realize that some members are working on nonpriority tasks, out of the scope of this project, and beyond their responsibility.

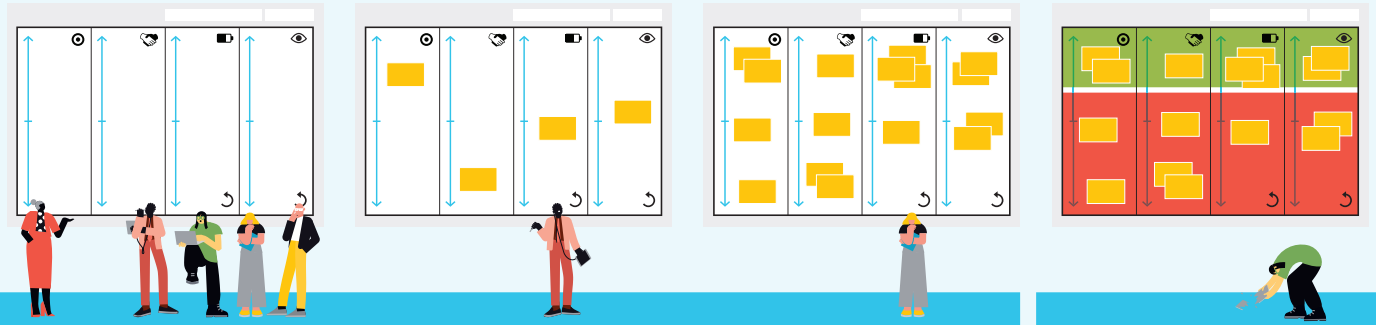
There have been recent changes in the organization and somehow, this information didn't make it to this team. This is the turning point of the meeting: team members realize that they were unaware of these changes.

3
Repair

Simone explains that some activities are no longer to be performed by the team, since they will be externalized soon. She clarifies the new priorities and the objectives of the CRM project to the team. Team members are relieved and confirm with a new vote that under these new conditions everyone will be able to perform their parts on time.

The CRM project is eventually delivered on time.

Run Your First Assessment



1 Reveal

Announce the mission, project, or subject

- What's the challenge?

Vote individually

- Do you think you can do your part?

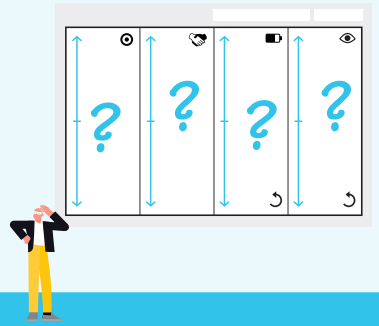
Acknowledge the result

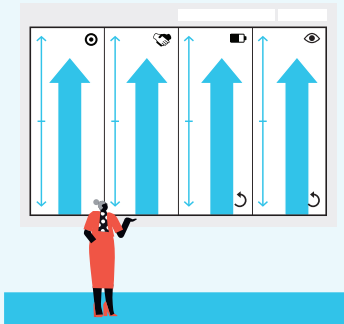
- What's the collective result?

2 Reflect

Interpret the vote

- Surprised or not surprised? Is it more positive or negative for us?
- Where are the problems?





3
Repair

Analyze the problems

- What's causing the problems?
- What causes the perception gaps?
- What prevents that requirement from being in the green zone?

Decide and announce the repair actions

- What concrete actions/ measures should we take to redress the situation?
- What can be done to get most of the votes in the green zone next time?

Team validation

- Do you think you can do your part now?