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How to conduct a high impact team self-evaluation session

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Team members shuffle into the conference room. Some have a look of fear on their face. Others have a decidedly defensive posture. It soon becomes obvious that members' seating choice coincides with their functional role in the company (sales, accounting, or product development). The CEO and the VP of xyz corporation come in last and sit at the head of the table. I have been told ahead of time that the company had just hired the VP and that his transition into the team has been a bumpy one. Many of the team members have been with the company for a very long time and were accustomed to reporting directly to the CEO. The VP feels he has inherited a team that is fiercely loyal to the charismatic CEO and resistant to the introduction of an intermediary.

The CEO begins their team self-evaluation session by offering his take on the team's coordination processes, followed by the new VP. Next, he solicits team members' inputs using general questions such as "How does everyone think it's going?" "How can we improve?" "What are your concerns?" Some members look like deer caught in headlights. Others shoot knowing looks at one another but remain silent. Finally, a senior member hesitantly points out that the extra steps involved in getting approval (introduced by the new VP) have slowed down his work. The VP snaps back defensively and the room falls silent again. Visibly uncomfortable, the well-meaning CEO shifts gears and begins walking through a timeline of milestones from their most recent project, noting which were completed on time and which were missed. He asks each functional group one at a time to provide their perspectives on why. The discussion quickly turns heated as sales, accounting, and product development groups complain about one another. An hour later, team members shuffle out of the conference room looking either confused, embarrassed, angry, or frustrated. asked for their inputs.

I have seen similar scenarios unfold many times before in "After action reviews" conducted by military teams, "debriefings" of medical teams and aircrews, and "post-mortems" conducted by project teams in industry. In the

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weeks that followed the team self-evaluation session at xyz corporation, I was asked to speak with members one-on-one. Each raised issues that would have been highly relevant to discuss in the prior session. When I asked them why they had not been brought up earlier, I got familiar answers:

> "We jumped from topic to topic so quickly. I kept losing my train of thought."
>
> "I'm fairly new and I wasn't really sure if what I had to say was relevant."
>
> "I didn't want to offend the new VP."
>
> "I didn't want to disappoint the CEO."
>
> "I thought if I mentioned that problem it would make us in product development look bad."
>
> "I didn't bring it up because, although it was an error, it didn't end up delaying the milestones for this particular project."

I integrated and summarized team members' inputs (with their permission) in a report for the CEO and followed up with a working lunch. The CEO was surprised by the wealth of insights and suggestions his team had expressed, yet frustrated that they had not shared these during the team self-evaluation session. I suggested we try a second time, using a method of structuring and facilitating the discussion that has been shown to significantly improve team performance. He agreed.

LEVERS FOR HIGH IMPACT TEAM SELF-EVALUATION

Whether they are referred to as debriefings, after action reviews, post-mortems, or team building sessions, most teams periodically meet to discuss their processes and to make course corrections. However, the manner in which these sessions are conducted varies substantially both across and within organizations. Much research has been done to understand how, when, and why some strategies result in a greater impact than others. However, the results of this research are often published in sources that are read primarily by the communities that have funded the research. These are largely the military, NASA, the FAA, law enforcement, and the medical community. The objective of this article is to summarize best practices from this research and to describe a practical strategy that ties them together and has been shown to significantly improve team performance.

Structure

The three most common approaches to structuring the content of what is discussed during team self-evaluations are (1) no real structure (or an inconsistent one), (2) a chronological discussion of a project or past event, or (3) a discussion of performance issues by type or category (e.g., communication, workload sharing). Leaders who impose no formal or consistent structure on team discussions of their performance often report that their intention was to give members the freedom to talk about the things they saw as most important. The problem with this approach, however, is that team members are often unsure about which topics are relevant to bring up. General questions like "How do you think we are we doing?" or "What could we do better?" tend to yield equally general impressions that lack the detail to be actionable. Moreover, an unstructured team discussion is typically chaotic. Research has shown that without a prescribed structure, members' ability to retrieve relevant memories is disrupted by listening to one another's disconnected inputs. This has been referred to as *collaborative interference*.

Reviewing team performance using a chronological structure while seemingly intuitive has disadvantages as well. Leaders who use this approach typically seek to identify where in a chain of events teamwork broke down. A replay of events in the order they occurred is viewed as less likely to miss important details. However, it also has some unintended negative consequences. When a team discusses their past performance chronologically, the outcome of a specific project or event is made particularly salient. Knowledge of performance outcomes biases memories and assessments of performance processes. This phenomenon is referred to as *hindsight bias*. Thus, to the extent a team organizes their discussion around the chronology of a specific project or performance episode, members are likely to selectively recall and discuss only those actions that directly contributed to the outcome. Moreover, it can lead teams to discuss their faulty processes to the exclusion of their effective processes. Prior research has shown that individuals develop richer knowledge and more adaptive skills when both positive and negative examples are reviewed. In other words, it is just as important to know what to keep doing as it is to know what to stop doing.

Finally, when a team structures its self-evaluation around the timeline of a particular project or event there is a tendency to narrowly discuss solutions and make plans that would lead to a better outcome provided they face the same or similar situation again in the future. To the extent that a team faces varied and unpredictable performance challenges, this approach will be maladaptive. Specifically, if a particular process is deemed (and remembered as) effective or ineffective solely on the basis of the idiosyncratic outcome of one project, there is a danger that a team may try to "fix something that is not broken" or miss an opportunity to correct something that is likely to be problematic in the future.

Structuring a team's discussion of their performance around categories of teamwork is a less common approach, but one my colleagues and I have found results in greater performance improvement. Doing so helps team members to develop more generalizable knowledge. The term *teamwork mental models* refers to the beliefs one holds about what effective teamwork looks like. Research has shown that individuals use their mental models to interpret novel situations and to guide their behavior. When mental models are highly situation-specific, individuals are less likely to recognize the relevance of their prior experiences in novel situations where they may be highly relevant. This has been referred to as the *inert knowledge* problem. However, as they accumulate experience, general rules are gleaned from concrete instances making mental models of teamwork more

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