

# **Pathways to Management and Leadership**

**Level 3: Principles of  
Management and Leadership**

**Unit 302**

**Managing a Team to Achieve Results**

# **Pathways to Management and Leadership**

## **Unit 302 Managing a Team to Achieve Results**

Copyright © Chartered Management Institute, Management House, Cottingham Road, Corby, Northants, NN17 1TT.

First edition 2018

Author:	Nicola Morris
Project Manager:	Ray Rowlings
Editor:	Tony Evans

British Library Cataloguing in Publication Data. A catalogue record for this title is available from the British Library.

ISBN: 0-85946-705-8

All rights reserved, save as set out below. No part of this publication may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, electronic, mechanical, photocopying, recording or otherwise, without the written permission of the copyright holder except in accordance with the provisions of the Copyright, Designs and Patents Act 1988 or under the terms of a licence issued by the Copyright Licensing Agency Ltd, Barnard's Inn, 86 Fetter Lane, London, EC4A 1EN

Applications for the copyright holder's written permission to reproduce any part of this publication should be addressed to the publisher. Permissions may be sought directly from Chartered Management Institute in Corby, UK. Phone Publications on (+44) (0) 1536 207379, or e-mail [publications@managers.org.uk](mailto:publications@managers.org.uk) for further information.

This publication is sold subject to the condition that it shall not, by way of trade or otherwise, be lent, re-sold, hired out, or otherwise circulated without the publisher's prior consent in any form of binding or cover other than that in which it is published and without a similar condition being imposed on the subsequent purchaser.

Approved centres may purchase a licence from the publisher, enabling PDF files of the publication to be printed or otherwise distributed solely within the centre for teacher and student use only according to the terms and conditions of the licence.

Further information on the licence is available from Chartered Management Institute. Phone (+44) (0) 1536 207379, or email [publications@managers.org.uk](mailto:publications@managers.org.uk).

**Managing a Team to  
Achieve Results**

SAMPLE

SAMPLE

# Contents

<b>About this workbook.....</b>	<b>9</b>
The unit .....	9
The aims of this workbook .....	9
Syllabus coverage.....	10
Getting started .....	11
<b>Section 1 The role and purpose of teams .....</b>	<b>13</b>
What is a team? .....	13
The purpose of teams.....	14
Team roles .....	19
Team dynamics.....	22
Team working vs lone working.....	25
Supporting resources .....	28
Summary .....	28
<b>Section 2 High performing teams .....</b>	<b>31</b>
High performing teams.....	31
Becoming a high performing team .....	34
Behaviours associated with high performing teams.....	36
Supporting resources .....	41
Summary .....	41
<b>Section 3 Leading, communicating and motivating a high performing team .....</b>	<b>43</b>
What is leadership style? .....	43
Action centred leadership .....	45
The 'leadership continuum'.....	46
Lewin's styles of leadership (1939) .....	47
Communication with the team .....	51
Your role as a team leader .....	56
Creating the right working environment .....	58
Supporting resources .....	60
Summary .....	60

**Section 4 Responding to challenges ..... 63**

The challenges of managing a team ..... 63  
Taking a proactive approach ..... 66  
Absence management ..... 70  
Supporting resources ..... 72  
Summary ..... 72

**Section 5 Managing the team's performance ..... 73**

Developing a sense of shared purpose ..... 73  
Developing shared purpose ..... 75  
Allocating work to team members ..... 77  
Monitoring team performance ..... 81  
Providing feedback on performance ..... 87  
Timing the feedback ..... 92  
Supporting resources ..... 94  
Summary ..... 94

**Before you move on ..... 95**

Preparing for assessment ..... 95  
Reflecting on progress ..... 97  
Planning your next steps ..... 97  
The Management and Leadership Standards ..... 98

**Further Resources ..... 101**

SAMPLE

# About this workbook

## The unit

The main purpose of this workbook is to support you as you study for the Chartered Management Institute Level 3 qualification — Principles of Management and Leadership, so it specifically focuses on the content of the syllabus for Unit 302 Managing a Team to Achieve Results. This is about the way in which you manage and support your team to achieve organisational goals.

This workbook provides underpinning knowledge and develops understanding to improve your skills as well as to prepare for future assessment. If you are studying towards the Level 3 qualification, then you will be assessed by your approved centre on 'your knowledge and understanding of' the following learning outcomes:

1. Understand the role and purpose of teams
2. Be able to recognise the characteristics of a high performing team
3. Know how to lead, communicate with and motivate a high performing team
4. Know how to respond to challenges when managing a team proactively
5. Know how to manage the performance of a team.

## The aims of this workbook

This workbook aims to help you learn how to manage teams to achieve results. You will explore the nature of teams in the workplace; consider the different types of team and team roles. Focussing on high performing teams, you will develop your understanding of the characteristics and behaviours of a high performing team.

This workbook is about how you can:

- Lead, communicate and motivate your team
- Respond to challenges which arise
- Manage the performance of your team.

## Syllabus coverage

The table below shows which sections of the workbook address the assessment criteria of the qualification syllabus.

<b>Unit 302 Managing a Team to Achieve Results</b>		<b>Addressed within section</b>
<b>Syllabus coverage</b>		
1.1	Define the purpose of teams	1
1.2	Explain types of teams in an organisation	1
1.3	Summarise the roles in a team using a recognised theory	1
1.4	Explain how members of a team affect team dynamics	1
1.5	Identify the advantages and disadvantages of team working and lone working	1
2.1	Outline the characteristics of a high performing team	2
2.2	Discuss behaviours which can be observed in a high performing team	2
3.1	Identify advantages and disadvantages of leadership styles that can be used to manage a high performing team	3
3.2	Assess communication methods used for different types of teams	3
3.3	Explain how to motivate a team to achieve results	3
4.1	Explain the challenges of managing a team	4
4.2	Explain how to respond to challenges proactively	4
4.3	Outline approaches to absence management	4
5.1	Outline approaches to ensure team members work to a shared purpose	5
5.2	Explain how to allocate work to team members	5
5.3	Identify methods of monitoring team performance	5
5.4	Explain how to provide feedback on individual and team performance	5

## Getting started

The ability to manage teams, which are able to communicate effectively and overcome barriers to achievement, is a critical skill for any manager. High performing cohesive teams are created in an environment where there is a collective understanding of values, goals and objectives. This unit has been developed to support managers in understanding the nature of teams in the workplace, and how these can be managed to achieve results.

This workbook will help you develop an understanding of the role and purpose of teams. For example, learning about the difference between a group and a team and what you can do to develop a high performing team. You will gain an insight into different leadership styles and how these can be adapted to be effective in leading a team to perform. You will specifically learn about how to motivate, communicate and pro-actively resolve any issues that could impact on performance. From a management perspective, you will gain an understanding of managing absence and workload and the importance of providing constructive feedback.

## How to use the workbook

The workbooks provide ideas from writers and thinkers in the management and leadership fields. They offer opportunities for you to investigate and apply these ideas within your working environment and job-role.

## Structure

Each workbook is divided into sections that together cover the knowledge and understanding required for that unit of the Level 3 Principles of Management and Leadership. Each section starts with a clear set of objectives that identify the background knowledge to be covered and the management skills in the workplace that enable you to demonstrate this knowledge. You do not have to complete the sections in the order they appear in the workbook, but you should try to cover them all to make sure that your work on the unit is complete. There are self-assessment questions at the end of each section that allow you to check your progress. You may want to discuss your answers to the self-assessment questions with your line manager or a colleague.

## Activities

Throughout the workbooks there are activities for you to complete. These activities are designed to help you to develop yourself as a manager. Space is provided within the activities for you to enter your own thoughts or findings. Feedback is then provided to confirm your input or to offer more ideas for you to consider.

To get the best from the workbooks, you should try to complete each activity fully before moving on. However, if the answer is obvious to you because the issue is one you have encountered previously, then you might just note some bullet points that you can then compare quickly against the feedback. You may sometimes find it difficult to write your complete response to an activity in the space provided. Don't worry about this — just keep

a separate notebook handy, which you can use and refer to as needed.

Try not to look at the feedback section before completing an activity. You might like to try covering up the feedback with a postcard or piece of paper while you are working through an activity.

### **Timings**

Timings are suggested for each section and activity, although it is important that **you** decide how much time to spend on an activity. Some activities may occupy only a few moments' thought, while others may be of particular interest and so you might decide to spend half an hour or more exploring the issues. This is fine — the purpose of the activities is to help you reflect on what you are doing, and to help you identify ways of enhancing your effectiveness. It is always worth writing something though, even if it's brief — the act of writing will reinforce your learning much more effectively than just referring to the feedback.

### **Scenarios**

There are scenarios and examples throughout each workbook to illustrate key points in real workplace settings. The scenarios cover a wide range of employment sectors. As you work through, you might like to think of similar examples from your own experience.

### **Planning your work**

The reading and reflection, scenarios and activities in each section of the workbooks are designed to take around two hours to complete (although some may take longer). This is a useful indicator of the minimum length of time that you should aim to set aside for a study session. Try to find a quiet place where you will not be interrupted and where you can keep your workbooks, notes and papers reasonably tidy. You may also like to think about the time of day when you work best — are you a 'morning person' who likes to get things done at the start of the day, or do you work better in the evening when there may be fewer disturbances?

### **Preparing for assessment**

Further information on assessment is available in the Qualification Support section of ManagementDirect, CMI's online resource portal. If you have any further questions about assessment procedures, it is important that you resolve these with your tutor or centre co-ordinator as soon as possible.

### **Further reading**

Suggestions for further reading and links to management information are available via ManagementDirect. You will also find titles for Supporting Resources at the end of each section and Further Reading at the end of the workbook.

# Section 1 The role and purpose of teams

## Learning outcomes and assessment criteria (about 4 hours)

By the end of this section you will understand the role and purpose of teams and be able to:

1.1	Define the purpose of teams
1.2	Explain types of teams in an organisation
1.3	Summarise the roles in a team using a recognised theory
1.4	Explain how members of a team affect team dynamics
1.5	Identify the advantages and disadvantages of team working and lone working

## What is a team?

The word “team” means different things to different people. The word is used widely both in the workplace and outside to describe a variety of situations in which people pull or work together. Organisational success is dependent on all employees working together in pursuit of common goals. Organisations of all sizes and in all sectors bring people together to help organise and achieve their objectives. Some of these may be true teams and others may just be groupings of people.

### Activity

**Activity 1.1** **(about 15 minutes)**

Identify the different groups or teams you belong to either in the workplace or outside of work. Consider these in relation to the following questions:

Do these have a shared goal?

Does everyone need to work together to achieve that?

**Feedback**

- *A team is defined as being a group of individuals who share a common purpose or goal which can be accomplished through everyone's shared efforts. Shared goals are what make the difference between a team and a group.*
- *A team has:*
  - *a clearly defined role for everyone in the team*
  - *a concrete measurable goal*
  - *members who take decisions together, work collaboratively and cooperatively for the greater good and are jointly responsible for outcomes*
  - *a reason for the team to unite*
  - *someone whose role is to coordinate, facilitate or lead efforts.*

**The purpose of teams**

Teamwork is an essential part of any organisation. Teams are formed to combine resources and effort in support of specific organisational goals. Baguley (2002) identified four main teams and their purposes found in organisations:

**Teams which provide management or control of activities**

The Senior Management team is an example of a team which oversees or co-ordinates activity on an ongoing and continuous basis. Their contribution shapes the direction and activities of an organisation.

Specific project teams may also be formed to oversee or manage a time limited project; for example, the implementation of a new computer system or the opening of a new building. In this case the team is likely to consist of members drawn from a wide range of functions who contribute to the overall goal by using their own specific skills and knowledge. This type of team is temporary in nature and once the project is completed will disband. Membership of such teams provides many good development opportunities.

In both cases the team will take collective responsibility for their work.

**Teams which make something**

Production is often organised into a number of teams each of which adds value by creating together, either a specific product or part of a product. The size of these teams is dependent on the actual task. However, they tend to be small and to consist of individuals who have been trained and are versed in the task or product.

### Teams which do something

Sales, marketing or finance are examples of teams which are involved in essential value-adding activities in an organisation. Their output is more intangible, for example producing plans, ideas or information others use. A further example is a customer services team which has a shared goal of ensuring high levels of customer satisfaction. This team works together to find solutions to issues which arise in order to maintain a positive relationship with its customers.

Specific targets and goals for these teams may be set by others or derived from an organisation's vision and mission statements. Members are usually drawn from a single functional discipline and will be skilled in the work being carried out. These teams tend to be permanent in nature.

### Teams which evaluate or make recommendations

Teams may be established with the purpose of reviewing work in a specific area (perhaps responding to specific quality issues or problems) or identifying areas for continual improvement of processes, products or services. Such teams may comprise those who are best suited to the task at hand or may be drawn more widely. Quality Circles or Continual Improvement Teams are examples of the latter and are used in many organisations to improve performance.

These teams are often more temporary and will work to deadlines agreed in the organisation.

#### Activity

#### Activity 1.2

(about 20 minutes)

Identify different teams within your own organisation (or one you are familiar with). What purpose does each serve? Why do you think this is best achieved through a team rather than a group?

#### Feedback

*Whilst your answers will be unique to your own organisation you should have identified that in all cases the team provides a structure and means to achieve a specific purpose bringing people and their efforts together. This leads in turn to a better understanding of issues and decisions taken, greater support for each other's efforts, increases problem solving efforts and ensures greater ownership of changes. Through combined efforts more can be achieved than if each individual works in isolation.*

## Team types

There are many different types of teams. The type of team will be dependent on many factors, such as its purpose, the volume, nature, and type of work.

Teams commonly found in an organisation include:

- small teams e.g. two people working together on a project
- large teams e.g. nurses working in a hospital
- permanent teams e.g. payroll administrators in a shared service centre
- temporary teams e.g. seasonal workers at a holiday camp
- functional teams e.g. specialists working in a law firm
- matrix teams e.g. employees with different skill sets specifically selected to work together on a project due to their individual knowledge and skills
- cross functional teams e.g. representatives from different departments working together to agree an engagement strategy
- project teams e.g. people contracted to work together to set up a new factory
- virtual teams e.g. sales people located in different areas of the country.

### Activity

#### Activity 1.3

(about 5 minutes)

What type of team do you work in?

### Feedback

*Your answer will reflect the work you do and how your organisation prefers to structure, coordinate and manage its activities. In turn the type of team determines how that team is organised and managed and the communication approaches taken.*

## Permanent or temporary teams

In your own organisation you may refer to the sales or marketing team, the finance team etc. These are examples of permanent teams. Membership is often linked to job role with members

leaving the team when they change job or leave the organisation. Temporary teams in contrast are formed for a specific shorter duration. These teams may be formed to assist other teams during busy periods or in response to specific needs such as an increase in work or change of system.

### **Functional teams**

These teams comprise people who carry out the same or similar specific functions in an organisation. They include members from the same department or work area who meet regularly. The manager or leader has overall responsibility and accountability for the work, with team members reporting to this person. Often these teams are permanent.

Functional teams work well when dealing with routine tasks enabling the line manager to keep control over both tasks and quality. Functional teams enable both technical and professional expertise to be pooled.

Communication and coordination across functional areas can sometimes be problematic, slower and needing to overcome a number of barriers. Decision making tends to be pushed upwards.

### **Matrix and cross functional teams**

Matrix teams are often formed to meet specific project needs. Staff are selected on the basis of their skills, knowledge or contribution from a pool of possible members. Individual team members will report to different managers for different aspects of their work. Staff will be responsible to the project manager for their work on the project, while their functional line manager will continue to be responsible for other aspects of their work including attendance and performance management.

Some organisations also use a matrix structure where work is highly specialised or technical. In these organisations the technical aspects of the work are managed by one person, with administration being the responsibility of a more general manager.

A cross functional team may be formed when people from different areas come together to help successfully complete a task. This may happen, for example, when a key member of staff is taken ill and someone is moved temporarily from another area to provide assistance.

## **Activity**

### **Activity 1.4**

**(about 20 minutes)**

You have applied for an internal promotion. If successful you would be managing a matrix team. Your interview is next week. Anticipating questions you may be asked use the space below to make brief notes on foreseen advantages and disadvantages of

matrix team working.

### Feedback

*Matrix teams work well where the work is highly specialised or technical. This form of team work allows skills to be combined and knowledge shared whilst being controlled and managed by someone with appropriate knowledge and experience. This maximises the use of internal staff capabilities.*

*Dual reporting may however cause issues when conflicting instructions are given by the two different managers. To make matrix working successful there needs to be good interpersonal relationships amongst team members and with the line manager. Regular, effective communication is essential together with clarity on priorities and working processes.*

### Virtual teams

Virtual teams are comprised of members who are not physically located together. They may be located in different towns or even separate countries or work at different times (perhaps working different shifts or days). These teams work to a common goal and often rely on technology to share information and communicate.

### Special, project or task force teams

These teams are formed for a special purpose of working on a specific project or finding a solution to a very critical problem. A task force may be established to investigate a specific issue and explore possible solutions.

### Activity

#### Activity 1.5

**(about 20 minutes)**

You have been asked to lead a project team charged with overseeing the refurbishment of the staff canteen and rest areas. The team will comprise a number of volunteers from across the organisations working together with representatives of key departments who will take responsibility for aspects such as marketing and communication.

Your first meeting is being held tomorrow and you decide to spend 5 – 10 minutes outlining your approach to managing the team. What would you cover?



### Feedback

*In thinking about this situation you may have identified:*

- *a need for the team to bond quickly - providing time for everyone to introduce themselves will be important*
- *thoughts about how the team should work together, reiterating the common purpose*
- *outlining objectives and standards to be achieved including timescales*
- *discussing how the team should communicate with each other and how any differences will be dealt with - agreeing expected standards of behaviour and commitment could be achieved by setting out ground rules*
- *how you will be monitoring progress.*

### Team roles

The ability to manage teams is a critical skill for a manager. To be able to do this a line manager needs to develop an understanding of the roles that are required within a team for it to be efficient and effective.

Belbin (1993) identified nine roles which need to be filled in order for a team to work effectively. These roles are subdivided into three main categories:

- **Action oriented roles:** Shapers, Implementers and Completer Finishers
- **People oriented roles:** Co-ordinators, Team workers and Resource Investigators
- **Thinking roles:** The plant, Monitor Evaluator and Specialist.

Belbin explains that each of these roles “describes a pattern of behaviour characteristic, the way in which one team member interacts with another.”

A well balanced team will cover all of these roles. A team which is dominated by individuals who have a preference for one specific role will tend to be less successful. Imagine a situation in which everyone wishes to take charge or no one can complete and finish a task. These are likely to lead to conflict or work not being completed.

Not all of the roles are needed in equal measure, nor are they needed at the same time. Understanding the preferences of individual team members will help a manager take appropriate

action to help maximise success. This may involve targeted recruitment to the team, for example selecting an additional team member to ensure a specific role is filled. At an individual level understanding the roles that others play, knowing when and how to let another team member take over helps ensure that everyone's contribution is maximised.

**Activity**

**Activity 1.6** **(about 30 minutes)**

Complete the following table identifying the strengths and possible weaknesses associated with that role. You may find Belbin's Team roles (Management Models) on the CMI's learning portal ManagementDirect helpful in completing this task.

Team Role	Strengths	Possible Weaknesses
Shaper		
Implementer		
Completer finisher		
Co-ordinator		
Team worker		
Resource investigator		
Plant		
Monitor evaluator		
Specialist		

**Feedback**

*Compare your thoughts with the following:*

Team role	Strengths	Possible weaknesses
<b>Action oriented roles</b>		
Shaper	Acts as task leader providing direction and provoking discussion Drives progress	Task focus may lead to individuals being ignored or feeling provoked
Implementer	Turns ideas into practical actions	Can become wedded to own ideas Reluctant to delegate
Completer finisher	A perfectionist who is conscientious in checking the detail. Focuses on deadlines.	Inclined to worry unduly Reluctant to delegate