

The Ultimate Guide

TO USING ASSESSMENTS FOR TEAM BUILDING



TABLE OF CONTENTS

1	LET'S TALK ABOUT GOALS: <i>SETTING THE STAGE FOR YOUR TEAM BUILDING PLAN</i>	2
2	ASSESSMENTS TO THE RESCUE: <i>UNDERSTANDING PERSONALITY IN THE WORKPLACE</i>	9
3	TEAMWORK MAKES THE DREAM WORK: <i>BENEFITS OF USING ASSESSMENTS FOR TEAM BUILDING</i>	14
4	FIND YOUR GLASS SLIPPER: <i>CHOOSING THE RIGHT ASSESSMENT FOR YOUR COMPANY</i>	20
5	LET'S GET PERSONAL: <i>LEADING YOUR TEAM BUILDING SESSIONS WITH ASSESSMENTS</i>	29
6	FACE IT HEAD ON: <i>OVERCOMING THE BARRIERS TO MOVING FORWARD</i>	56
7	A QUICK STORY ABOUT A MONKEY: <i>A SHINING EXAMPLE OF TEAM ASSESSMENTS DONE RIGHT</i>	64
8	CONNECTING THE DOTS: <i>THE TEAM BUILDING CHECKLIST & BEST PRACTICES</i>	67

With cutting-edge technology at our fingertips and the growing influence of Millennials in the workforce, companies are having to restructure the way they connect and interact with the people on their teams. Employees are no longer solely motivated by vertical career growth, but rather an *integrated employee experience that emphasizes the importance of individual fulfillment, purpose, and a positive work environment.*

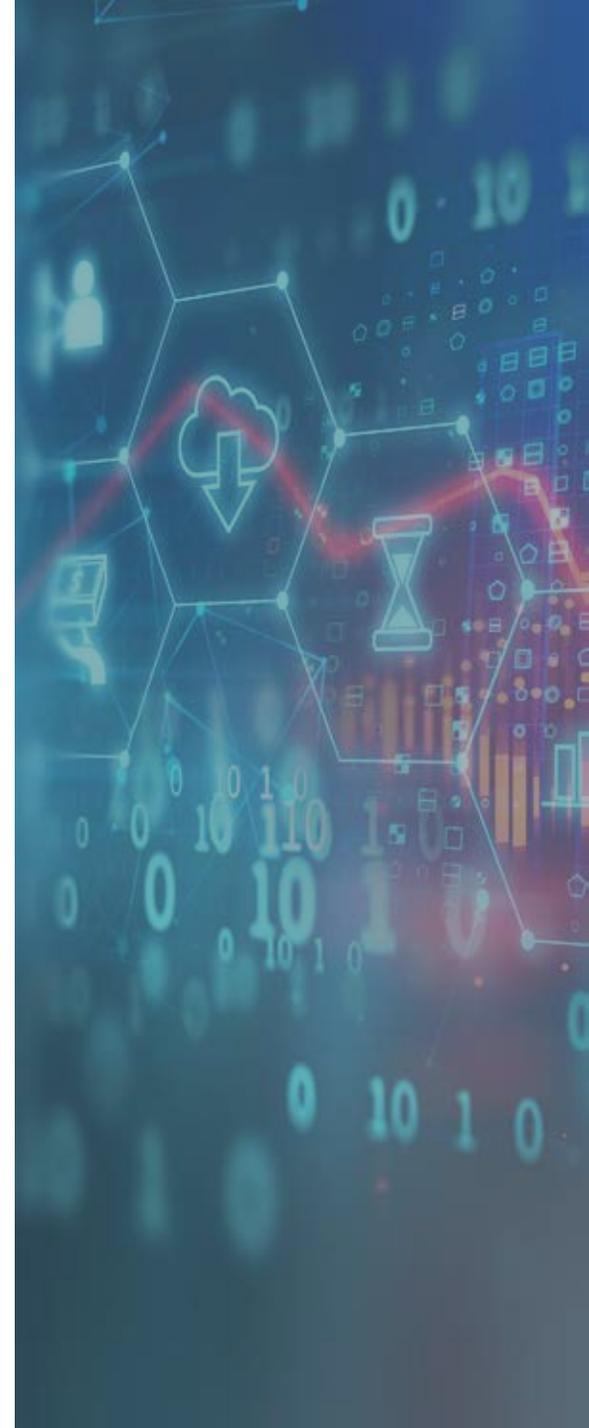
79% of people indicated that a POSITIVE EMPLOYEE EXPERIENCE is important/very important to them, while only 22% of companies indicated they were excellent at building a differentiated employee experience.

With odds that are stacked against the traditional corporate mindset, how can you break through these barriers to create a stellar employee experience that cultivates strong, effective teams? You're in luck—we've done the research for you!

In this guide we will explore the ways behavioral assessments can enhance your team building sessions, contributing to the overall employee experience your current and future employees are longing for.

Over years of observation and research, we've found *the key to creating an unbeatable culture is by fostering strong relationships between employees and encouraging them to learn about one another in a context that goes beyond the cubicle*—and assessments can do just that!

So, join us as we share the strategies we've found to be most helpful when facilitating an engaging team building session, and discover how you can make your teams even stronger with assessments!





CHAPTER ONE

LET'S TALK ABOUT GOALS

SETTING THE STAGE FOR YOUR TEAM BUILDING PLAN

FOUR MOST COMMON TEAM PROBLEMS

Before you dive into choosing an assessment, it is important to set goals that outline what you are looking to accomplish and why. Without identifying the motivations behind your team building strategy, your sessions will lack the depth needed to create an engaging experience.

One of the best ways to identify goals is to outline the roadblocks your team is facing.

1

MAINTAINING TEAM UNITY WITH REMOTE WORKERS

2

EXPERIENCING CONFLICT WITHIN THE TEAM

3

PRESERVING CULTURE DURING ORGANIZATIONAL CHANGE

4

DECREASING TREND IN OVERALL ENGAGEMENT AND MORALE



1. MAINTAINING TEAM UNITY WITH REMOTE WORKERS

This poses some big challenges for companies when trying to maintain a sense of unity between members of a team who are not regularly engaging in face-to-face interaction.

43%

of employees **WORK
REMOTELY** at least
some of the time.

AND OF THOSE...

31%

are spending more
than **80%** of their
time **OUTSIDE OF
THE OFFICE.**



2. EXPERIENCING CONFLICT WITHIN THE TEAM

Conflict is a natural part of working with other people, but a majority of employees in the workforce today have never received any kind of conflict management training. The key to keeping a team productive is having the tools, like an assessment, to navigate through a conflict and come out stronger in the end.



3. PRESERVING CULTURE DURING COMPANY CHANGE

While mergers and acquisitions can provide companies with many benefits such as rapid growth, they can also be risky for team morale and company culture. Often, employees have undergone rounds of layoffs, and those who survive are now part of hybrid teams that come from very different backgrounds.

Those companies that undergo rapid growth organically are also at risk for keeping their teams united. Akio Toyoda, president and CEO of Toyota Motor Corporation once noted, "Trouble results when the speed of growth exceeds the speed of nurturing human resources. To use the analogy of growth rings in a tree, when unusually rapid growth causes the rings to grow abnormally thick, the tree trunk weakens and is easily broken down."

60%

of corporations
CLOSED between
ONE TO SIX M&A
deals in 2016.

21%

CLOSED more
than ELEVEN.

75%

expect this
number to GROW
over the next
SEVERAL YEARS.

4. DECREASING TREND IN OVERALL ENGAGEMENT & MORALE

Unfortunately, when an employee is disengaged, their behavior has a ripple effect to the overall group dynamic and can affect team productivity.

51%

of employees are
NOT ENGAGED
at their place
of employment.

AND...

16%

are **ACTIVELY**
DISENGAGED—in
other words,
VERY UNHAPPY.





Conducting regular team building exercises can help align different team members' expectations and mitigate many of these problems. It is important to remember when setting your goals to focus on the longevity of your team building endeavors.

In other words, don't expect magic to happen after only one session.

To truly develop an integrated employee experience, **TEAM BUILDING MUST HAPPEN REGULARLY** and the camaraderie that comes out of these sessions should become **INGRAINED IN THE FABRIC OF YOUR COMPANY'S CULTURE.**





CHAPTER TWO

ASSESSMENTS TO THE RESCUE

UNDERSTANDING PERSONALITY IN THE WORKPLACE

WHAT DEFINES PERSONALITY?

Personality is complex, and out of the 7.6 billion people in the world, no one is born with the exact same one! This can make trying to understand and collaborate with those around us incredibly difficult.

Personality-based (or behavioral) assessments are a commonly used tool to help people learn more about themselves and those around them by *identifying the unique set of strengths, weaknesses, motivators, and preferences that make people different.*

- 1 **YOUR BEHAVIOR** (*HOW YOU "SHOW UP" TO OTHERS*)
- 2 **YOUR INTERESTS** (*WHAT MOTIVATES YOU*)
- 3 **YOUR WORLDVIEW** (*YOUR EXPECTATIONS*)



IN GENERAL, ASSESSMENTS:

1

ARE IMPARTIAL

2

PROVIDE A NON-JUDGMENTAL
LANGUAGE FOR DISCUSSING
PERSONALITY TRAITS

3

OPEN CHANNELS OF
COMMUNICATION

4

AID IN RESOLVING CONFLICT
WITHIN TEAMS

The breadth of information you can reveal through an assessment can vary widely depending on the complexity of the assessment's underlying algorithms and scoring patterns.

Most assessments, at the very least, will group people based on a specific set of traits such as extroversion, introversion, openness, and conscientiousness. These assessments can be very helpful if you are trying to determine how someone might fit into the overall culture of a company or within a specific team.

Other assessments dig deeper and analyze a person's behavior in relation to their worldview, as well as make predictions about how their behavior may be influenced by different situations.

While assessments come in a variety of forms, the most widely-recognized is known as the objective test. This type of assessment offers a standard set of questions, each of which is answered with a limited set of response options such as strongly agree, strongly disagree, true/false, etc.



THERE ARE TWO MAIN TYPES OF OBJECTIVE TESTS

SELF-REPORTED

<i>RESPONDENTS DESCRIBE THEMSELVES</i>		
	T	F
I set high standards for myself.	X	
I am usually very energetic.	X	
I enjoy frequent social gatherings.		X

AND...

SELF-REPORTED

<i>RESPONDENTS ARE DESCRIBED BY OTHERS</i>		
	T	F
He/She gets upset easily.		X
He/She is always prepared.	X	
He/She enjoys to be part of a group.		X





When it comes to using assessments in the workplace, you want to aim for a **ROBUST ASSESSMENT OPTION** that provides both **HIGH LEVEL METRICS** to help make comparisons among team members, as well as **BEHAVIORAL DATA** to help predict how someone might behave in a given role or work situation.

That's not to say you can't use a less robust option—you will just have fewer data-driven insights to pull from during your team building sessions.





CHAPTER THREE

TEAMWORK MAKES THE DREAM WORK

BENEFITS OF USING ASSESSMENTS FOR TEAM BUILDING

BENEFITS OF USING ASSESSMENTS FOR TEAM BUILDING

Heightened self-awareness from assessments can help solve many of the common people-related problems that employers face, as they provide a platform to understand the complexities of individuality and how it can influence relationships.

In fact, the number of companies using assessments in the workplace has been steadily increasing over the last decade, and it is now estimated that as many as 60% of workers are asked to take workplace assessments.

60% of workers are asked to take workplace assessments.

- 1 THEY CREATE AN UNBEATABLE CULTURE
- 2 THEY BUILD TRUST
- 3 THEY IMPROVE COMMUNICATION
- 4 THEY MEET EMPLOYEES' EMOTIONAL NEEDS
- 5 THEY PROMOTE SELF-AWARENESS



1 THEY CREATE AN UNBEATABLE CULTURE

Let's face it—culture can either make or break your company! When you create a great environment where employees feel welcomed and accepted, they will be happier and more productive. So, what exactly makes an unbeatable culture? Well, it depends who you ask. The latest release of The Employee Engagement Life Cycle Series indicates that *Human Resource Managers and employees have very different opinions on what makes a great culture* and what can destroy one.

This study touches on an important disconnect in the workplace today—*half of what makes or breaks a culture for employees has to do with interpersonal relationships, while HR managers place more importance on personal and organizational goals*. Assessments can help to bridge this gap and significantly improve relationships throughout your entire organization.



WHAT MAKES A CULTURE?

HR MANAGERS

1. Managers and executives leading by example
2. Employee benefits
3. Shared mission and values

VS.

EMPLOYEES

1. Pay
2. Coworkers who respect and support one another
3. Work-life balance

WHAT BREAKS A CULTURE?

HR MANAGERS

1. High stress environment
2. Company growth

VS.

EMPLOYEES

1. Unhappy/disengaged workers
2. Poor employee/manager relationships



Only 3 out of 5 employees trust that their fellow coworkers are committed to doing quality work.

2 THEY BUILD TRUST

Trust is one of the most critical elements necessary for a team to be productive. But only **3 out of 5 employees trust that their fellow coworkers are committed to doing quality work**. This is a staggering statistic that indicates many employees in the workforce do not work in an environment where there is mutual trust and respect. If a team is hesitant to trust that everyone does their own job well, it will be difficult for them to collaborate and complete projects together. One of the best ways to develop trust is to **encourage your team to be vulnerable with one another**.

Using behavioral assessments for team building can help **facilitate these conversations as they provide a non-judgmental language to discuss personality**. In other words, assessments can help your team understand that no personality style is better than another—**everyone has a unique set of strengths as well as weaknesses**. This mutual understanding can help break down the barriers that may keep your team from having candid conversations with one another.



3 THEY IMPROVE COMMUNICATION

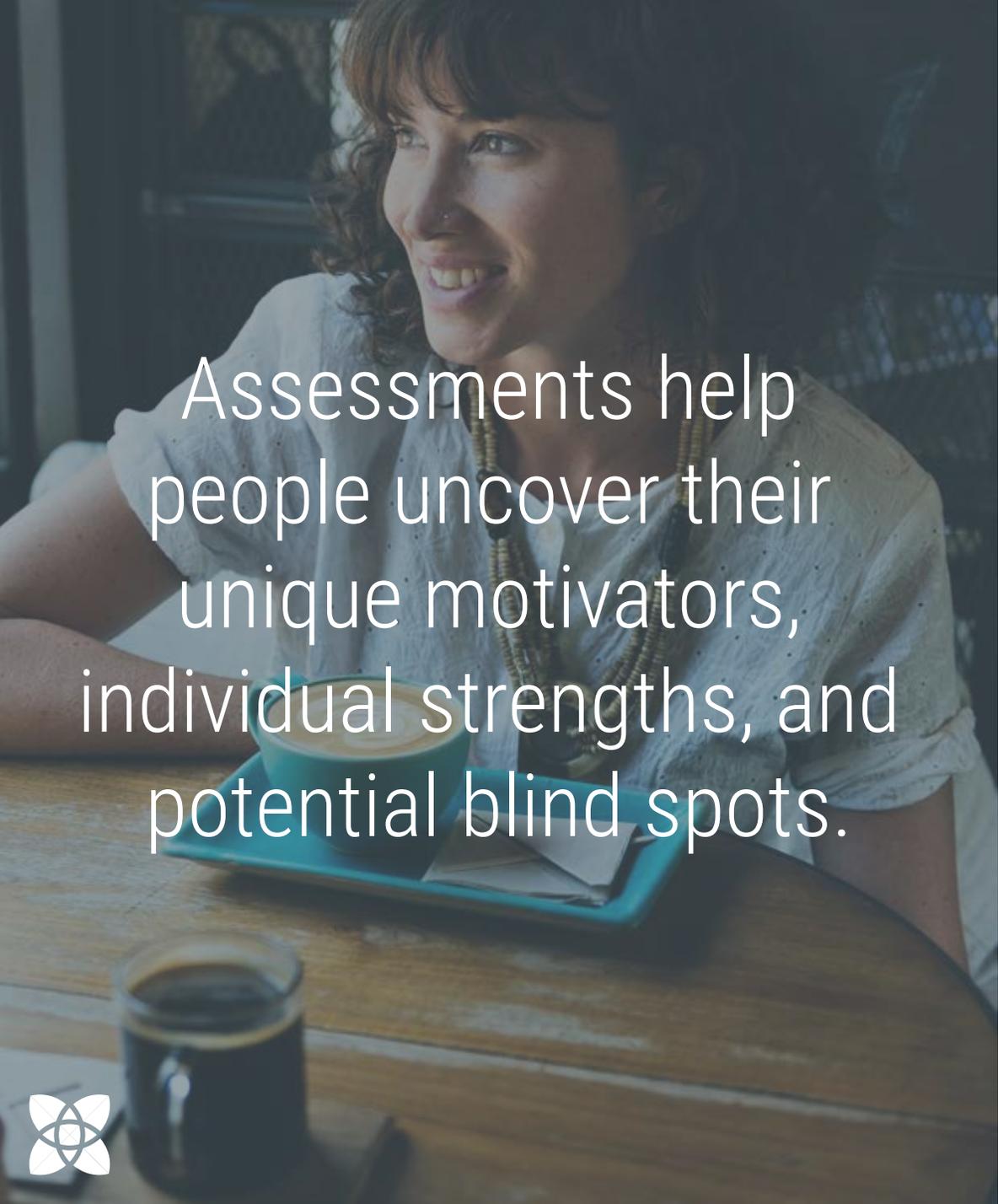
One of the things that makes teamwork so difficult is that we all have a variety of values, opinions, and preferences that influence the way we communicate. For example, let's say someone on your team prefers to receive candid and straightforward feedback. ***Their personal bias in this situation may influence them to provide feedback to others in the same way—even though it may not be everyone else's preference.***

Assessments break down these barriers by ***helping people understand their blind spots and expectations of others.*** This cultivates a culture of mutual understanding so your team members learn to tailor their communications to their audiences.

4 THEY MEET THE EMOTIONAL NEEDS OF EMPLOYEES

It's no secret that business and projects move so fast that it's difficult to set time aside to reflect. Providing teams with the time and resources to learn more about themselves and those around them contributes to the overall employee experience and helps each person on the team feel more emotionally engaged with their work. When that happens, you have the secret sauce—energized employees that collaborate well for increased productivity.





Assessments help people uncover their unique motivators, individual strengths, and potential blind spots.

5 THEY PROMOTE SELF-AWARENESS

Regardless of which assessment you use, respondents will have a chance learn a lot about themselves, including their unique motivators, individual strengths, and potential blind spots. There is an old adage: “You can’t love another until you love yourself.” This is also true when using behavioral assessments for team building—you can’t expect the members of your team to understand others before they have the chance to truly understand and embrace who they are.





CHAPTER FOUR

FIND YOUR GLASS SLIPPER

CHOOSING THE RIGHT ASSESSMENT FOR YOUR COMPANY

CHOOSING THE RIGHT ASSESSMENT

Now that you're pumped up about using behavioral assessments for team building, let's dive into finding one that aligns with your company's goals and objectives.

There are many different types of assessments to choose from, and the amount of choices can seem overwhelming.

To make your decision easier, here are some things you should keep in mind. We will go over each of them in more detail in the following pages.

- 1 ARE THE RESULTS SCIENTIFICALLY PROVEN?**
- 2 HOW IN-DEPTH DOES THE INFORMATION NEED TO BE?**
- 3 DOES THE ASSESSMENT WORK WELL FOR TEAMS?**
- 4 HOW EASILY CAN THE ASSESSMENT SCALE?**
- 5 HOW EASILY CAN THE RESULTS BE INTERPRETED?**
- 6 WHAT IS THE INVESTMENT?**



1

ARE THE RESULTS SCIENTIFICALLY PROVEN?

This one is important! If you are using the results from assessments to supplement any business-related decisions, it is crucial you choose one that is scientifically proven. *Without this, the reports may be inconsistent and highly unreliable*, making it difficult to truly capitalize on the strengths of your team, identify any roadblocks your team may be facing, and learn how to overcome them. Additionally, an assessment that is not validated can open you up to legal liability—especially when you are using them to supplement hiring decisions.

You should feel as confident in your workplace assessment as you do in your organization’s HR manager or CEO—you need something that you can always trust.

AN ASSESSMENT IS SCIENTIFICALLY PROVEN WHEN IT IS:



Our recommendation? Play it smart and opt for a scientifically proven assessment that will allow you to make informed decisions built on real data, not an observation. It will save you lots of time, effort, and money down the road and provide the insight your company is looking for.



2 HOW IN-DEPTH DOES THE INFORMATION NEED TO BE?

When comparing assessments, it is important to consider the amount of information each one can provide. For example, if you are only planning to use assessments as a fun way to have remote working teams interact, you may want to focus on those that provide *high-level personality insights for a quick team building session*.

On the other hand, if you are trying to manage a team that cannot seem to *overcome conflict or needs continual development, then you may need to find one that can dive deep into both individual and team dynamics*. Think again about the longevity of your team building plan—the depth of information should be proportional to the goals you are trying to achieve with unifying the team.

3 DOES THE ASSESSMENT WORK WELL FOR TEAMS?

All assessments offer behavioral data about an individual, but not all have the ability to dive into team dynamics. When using assessments for team building initiatives, it is *helpful to select an assessment that includes a variety of group reports that can analyze the team holistically*. Some assessments can dive even deeper with comparative reports that allow you to analyze two people on a team, and highlight their similarities as well as their potential areas for conflict.

While you could still choose to lead your sessions based on individual results, it may be harder to make group comparisons and identify any roadblocks the team may be facing.





Some assessments will have various reporting tiers that make it easy to switch from high level insights to more in-depth reports.

4 HOW EASILY CAN THE ASSESSMENT SCALE?

Some assessment companies *offer various reporting tiers that make it easy to switch from less detailed reports to more robust insights*. This is a great option if you need to demonstrate the value of assessments to the leaders in your organization before diving into your team building plan, or are looking to slowly integrate assessments into your team building initiatives. When an assessment is scalable, you might not have to use an additional assessment to switch between reporting levels, saving you a lot of time and money down the road.



5

HOW EASILY CAN THE RESULTS BE INTERPRETED?

Assessment results can either be self-interpreted or professionally-interpreted. *Self-interpreted assessments are great for companies that don't have a lot of time or want to start team building initiatives quickly.* Since certification is not required, anyone can read and understand the results at a glance. Be careful though—*self-interpreted assessments also tend to have fewer in-depth insights.*

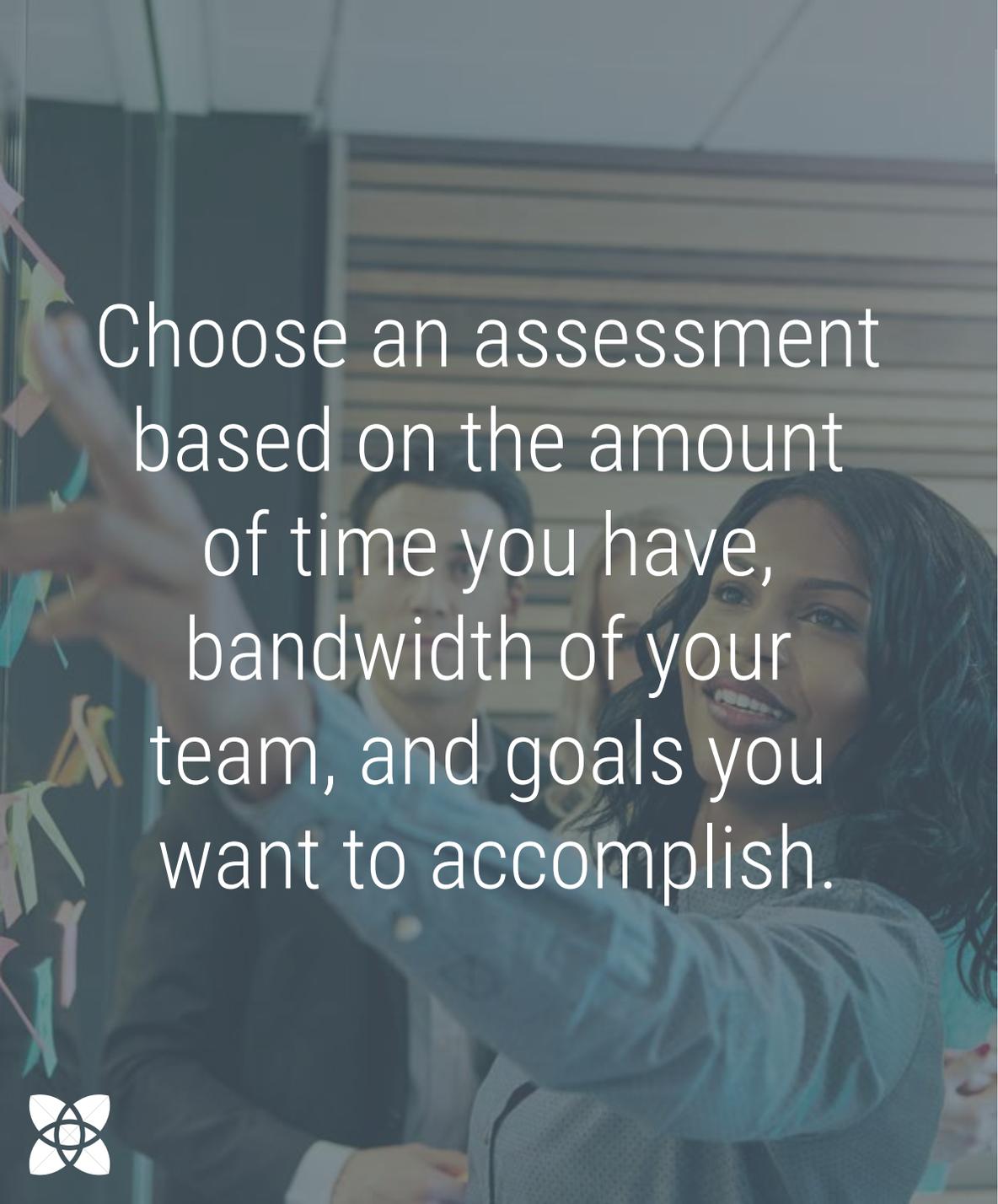
On the other hand, if you opt for a professionally-interpreted assessment, someone who has been through a formal certification process (either you or a consultant) will need to review the assessment results with each respondent.



OPTIONS TO INTERPRET RESULTS

- 1 **HAVE SOMEONE IN YOUR ORGANIZATION ATTEND CERTIFICATION TRAINING TO PROVIDE ASSESSMENT FEEDBACKS TO YOUR TEAM.**
- 2 **USE AN INDEPENDENT CONSULTANT TO DELIVER THE RESULTS.**

Whichever one you choose should depend on the amount of time you have to implement team building initiatives, the bandwidth of your team, and the goals you are looking to accomplish during your session. You'll also want to consider who you'd like to facilitate the workshop. Ideally, you'll want to have whoever is providing the individual feedback also lead the group through a team building activity.



Choose an assessment based on the amount of time you have, bandwidth of your team, and goals you want to accomplish.



Having someone within your organization facilitate your team building sessions will be helpful as they will often have an understanding of the company, the team, and the specific problems they may be facing. It may be easier to get at the heart of a problem if you are able to utilize someone who is more familiar with the situation or has witnessed the team problem themselves. You'll also always have that internal resource to lean on should additional interpersonal issues come up.

In some instances though, especially those where there is a conflict of interest between the facilitator and the team, it may be best to have an independent consultant lead the team building sessions. They will usually bring less bias to the session and are more likely to see any issues that arise from an impartial perspective.

While professionally-interpreted assessments seem to have a high barrier to entry, you can rest assured that it will be well worth it!

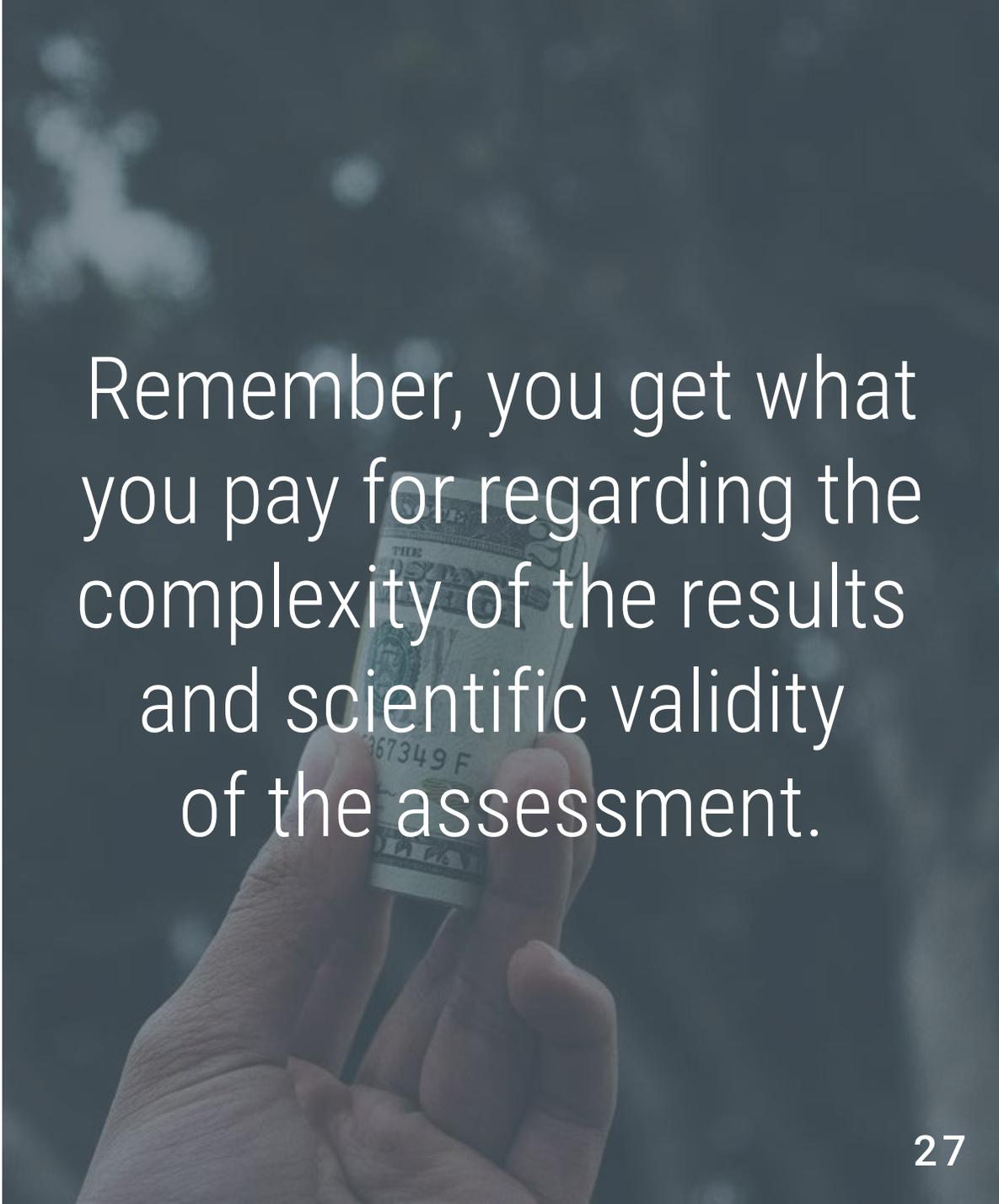
More often than not, these assessments can provide much richer data than those gathered from a self-interpreted assessment, and will be a much better choice if you are looking to get specific, actionable results from your team building sessions.

6 WHAT IS THE INVESTMENT?

Assessments can be priced in a variety of ways, including a *monthly fee*, *pay-per-report*, or *pay-per-assessment*. When selecting the right assessment for your organization, pay attention to the budget you have set for your team building initiatives and how many employees will receive an assessment. If you have multiple locations or plan on distributing the assessment to a large group of employees, many assessment providers will offer volume discounts. Be sure to explore those options, as they could save you a lot of money. Also, don't forget to consider the cost of certification (if that is the route you choose) and how many people would need to get trained to interpret the data, as that would additionally influence your budget.

Typically, those assessments that require the highest level of investment also offer the most opportunities for continuous team development—they can be used for many years and will cover an array of personality data. Remember, the greater investment you make in your assessment, the greater the benefits you will see within your teams.

There are a variety of free assessments you can choose from as well, but *keep in mind that you get what you pay for regarding the complexity of the results and the scientific validity of the assessment*. While the free options may seem like a tempting solution, they should only be considered if you do not need specific, actionable results from your session.



Remember, you get what you pay for regarding the complexity of the results and scientific validity of the assessment.





The overarching takeaway is to keep the **COMPLEXITY OF THE ASSESSMENT** in mind and how the insights they generate can help achieve the goals you have set for your team building sessions.

As a general rule of thumb, if you are looking to use team building activities to **INCREASE ENGAGEMENT** or as a fun way to get your teams together, go for a **LESS COMPLEX ASSESSMENT**.

If you are looking to have your team building sessions supplement more actionable objectives such as **DEVELOP STRONGER TEAMS**, improve communication, or solve a problem, then opt for a **MORE ROBUST ASSESSMENT**.





CHAPTER FIVE

LET'S GET PERSONAL

LEADING YOUR TEAM BUILDING SESSIONS WITH ASSESSMENTS

LET'S EXPLORE HOW YOU CAN USE ASSESSMENTS TO LEAD ENGAGING TEAM BUILDING SESSIONS FROM START TO FINISH!

DETERMINE YOUR PATH WITH TWO QUESTIONS:

DO I NEED A QUICK ACTIVITY THAT WILL GET MY TEAM TOGETHER?



THE SHORT & SWEET METHOD

Skip ahead to page 31

DO I NEED TO ADDRESS A CULTURAL, TEAM, OR INDIVIDUAL PROBLEM WITHIN MY ORGANIZATION?



THE DEEP DIVE METHOD

Skip ahead to page 40

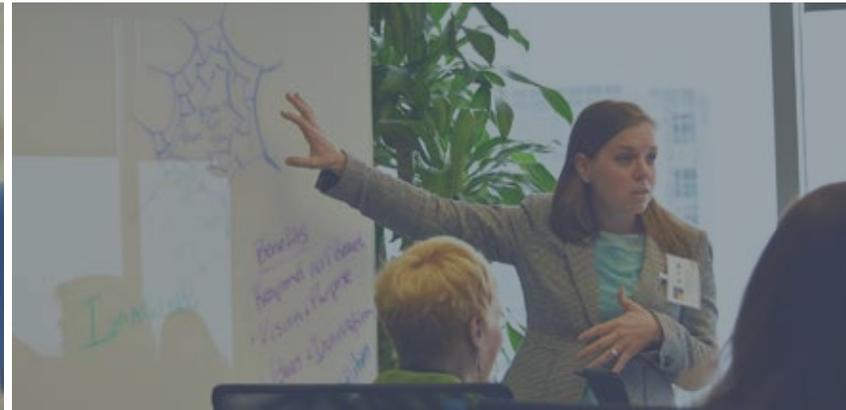
Each path will take you on a different journey - let's jump in!





THE SHORT & SWEET METHOD

IDEAL FOR QUICK TEAM BUILDING SESSIONS



BEFORE YOU BEGIN, HERE ARE A FEW THINGS TO CONSIDER

Congratulations!

The reason you are here is because you are looking to **HAVE FUN WITH YOUR TEAMS**, which is a great way to contribute to the overall employee experience!

For this method, ***focus on assessments that provide high-level insights into personality, or ones that can scale within your company.*** Because the goal of this team building session is to bond and have fun together as a team, it is not necessary to select an in-depth assessment. Instead, choose the one that you think will resonate the most with your team.

This approach will save your organization time and money. A less complex assessment will have an inherently lower cost than some of the more in-depth ones and the results will most likely be self-interpreted, eliminating the need to attend certification. Since the stakes are lower, you will also probably need less buy-in from the leadership in your organization.

While this method requires less of an investment in regards to time and money, it ***provides the people on your team with the lowest amount of insight into their personality.*** Don't let this discourage you though! Remember, you are not trying to solve a problem with this method—the goal is to have fun! If you think you might want to dig deeper into your teams in the future, you can always look for an option that is scalable. This will provide you with access to additional reports should you need them, and depending on the assessment, you might not even have to re-assess your team!





The following steps will guide you through preparing and facilitating a team building session that is sure to make an **IMPACT!**

1 ADMINISTER THE ASSESSMENT & GET BUY-IN FROM TEAM

Before you administer the assessment to your team, it is important to **share the overarching goals** of the session and what you are looking to accomplish during your time together. Making the team aware of the reasons why they are being asked to complete the assessment can help **generate interest and ensure they answer the questions honestly**. Be sure to provide ample time for everyone to finish the assessment—you want to be sure the experience remains positive to keep people energized.



2

SELECT REPORTS & FORMULATE A PLAN OF ACTION

You'll next want to spend some time researching the specific assessment you chose and the types of reports it can provide. *Focus on one or two key reports and stick to those.* You will overwhelm the group if you try to accomplish too much in the first session.

Next, familiarize yourself with the results of each person on your team and make comparisons about how they relate to the group as a whole. Begin to formulate a list of questions you'd like to have the group discuss.



DISCUSSION QUESTIONS

- 1 DO YOU AGREE WITH THE RESULTS? WHY OR WHY NOT?
- 2 CAN YOU GIVE AN EXAMPLE OF A TIME YOU MAY HAVE DEMONSTRATED A BEHAVIOR THAT REFLECTS YOUR RESULTS?
- 3 HOW DO YOU THINK YOUR PERSONALITY PROFILE FITS IN WITH THE GROUP?
- 4 WHAT ARE THREE STRENGTHS YOU CAN INFER ABOUT THE GROUP?
- 5 WAS THERE ANYTHING THAT SURPRISED YOU? HOW SO?
- 6 WAS THERE ANYTHING THAT YOU WEREN'T ALREADY AWARE OF? IF SO, CAN YOU EXPLAIN WHY?

EXAMPLE ACTIVITY: MOTTO, PICTURE, SONG

You'll also want to plan out any activities you'd like to include in the session. This is a great way to get your team more engaged and energized about their results.

Check out this sample activity that you can use with your group:

The goal of this activity is to reinforce some of the basic terminology of the assessment you are using and get your team working together to solve a problem — and share a few laughs along the way! Here's how it works:

- 1** Most assessments will categorize people into specific groups based on a set of traits such as extroversion, introversion, openness, and conscientiousness to name a few. Separate your team into whichever behavioral groups are predetermined by your assessment of choice.
- 2** Have each team come up with a motto, a picture, and a song that would fit with the description of their behavioral group.
- 3** After several minutes, have everyone come together and encourage them to share their answers.
- 4** Repeat the exercise until each mini team has come up with a motto, a picture, and a song for every behavioral group in the room.

**MOCK SOLUTION
FOR EXTROVERTS**



MOTTO

There's no
"I" in TEAM

PICTURE



SONG

Let's Get Loud



3 PREPARE FOR THE SESSION

There is also some prep work that needs to be done the day of the session.

Here's a checklist that can keep you organized:



WORKSHOP CHECKLIST



BRING ANY MATERIALS YOU MAY NEED WITH YOU INCLUDING:

- *PRINTED COPIES OF INDIVIDUAL REPORTS*
- *NAME TAGS (IF THE PARTICIPANTS DON'T KNOW EACH OTHER)*
- *PROPS FOR ACTIVITIES YOU HAVE PLANNED*
- *DIGITAL COPIES OF REPORTS IF YOU'D LIKE TO SHARE ON PROJECTOR SCREEN*



ARRANGE TABLES INTO GROUPS AND DECIDE IF YOU'D LIKE THE TEAM TO SIT IN A PREDETERMINED LOCATION.



SET UP FOR ANY ACTIVITIES THAT YOU WILL BE CONDUCTING DURING THE SESSION—THIS WILL ALLOW FOR A SEAMLESS TRANSITION BETWEEN DISCUSSION AND ACTIVITY.



DISTRIBUTE ANY MATERIALS THE PARTICIPANTS MAY NEED INCLUDING PENCILS, PAPER, PROPS, ETC.



Now that you have a plan, you are ready to begin leading a session!

4

FACILITATE THE TEAM BUILDING SESSION

Now that you have a plan, you are ready to begin leading a session!

Begin the session with a ***brief overview of what you are looking to accomplish during your time together.*** This will help set the stage for your team and give them an idea of what to expect. It can also prevent them from getting too caught up in their individual scores if they know the goal of the session is to bond with others.

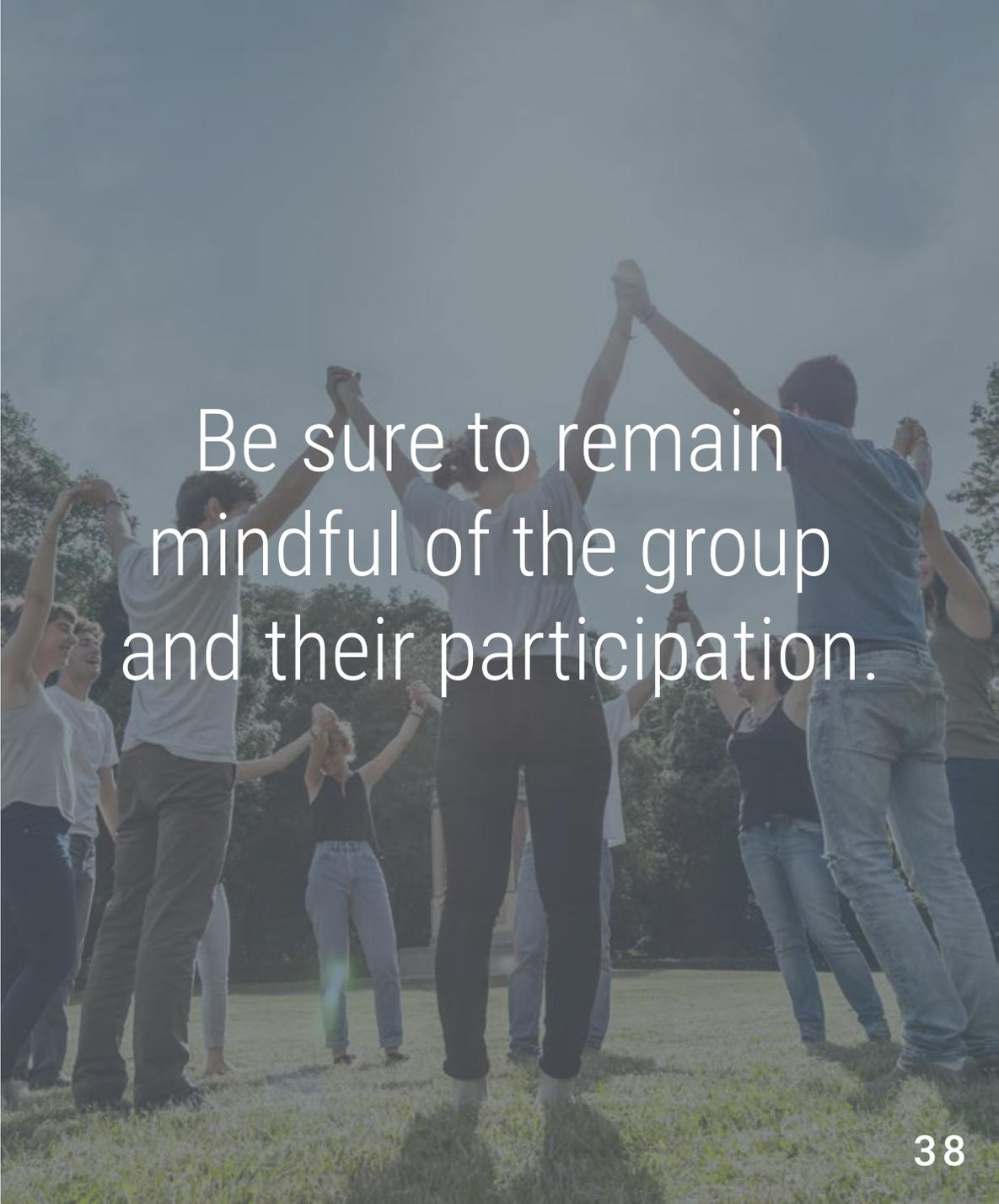
You'll then want to ***share a general overview of the assessment's unique terminology and concepts.*** It's important to keep this part short. Assessments can provide a lot of information, and you only want to share the parts that are relevant to your session. Your goal during this time is to keep your team engaged with the content and excited about their time with you.



Next, share the assessment results with the team and ***jump into a discussion that allows them to interact with their personality profiles.*** Begin the conversation with one of the discussion questions you prepared prior to the session. It can be helpful for you as the facilitator to share information about your profile first as a way to open the door and encourage everyone else to join in.

Be sure to be mindful of the group and their participation. You should make sure everyone has a chance for their voice to be heard. If you notice someone pulling away from the discussion or becoming disengaged, try to wrap them back in to the conversation. Chances are, that person might feel uncomfortable about one of their scores or may find it difficult to share information with the group—and that's ok! Reinforce that the goal of this session is to have fun, and that there are no right or wrong personalities.

Remember to break up the discussion with activities! Because this session is intended to be light-hearted, you want to be sure there is more action than



Be sure to remain
mindful of the group
and their participation.



5 GET FEEDBACK FROM THE GROUP

After you finish your team building session, you'll want to get feedback from the group.

Once you get the feedback, you can gauge the success of your session and determine if you met the overarching goal you were looking to accomplish.

If you get an overwhelmingly positive response from your team, you might want to consider expanding your use of assessments. You could do this by hosting additional sessions, upgrading to a more in-depth assessment, or weaving conversations about personality into your day-to-day discussions.

That's it! You've now successfully led a fun and engaging session with your teams!



FEEDBACK QUESTIONS

- 1 WHAT DID YOU LIKE ABOUT THE SESSION?
- 2 WHAT DID YOU DISLIKE ABOUT THE SESSION?
- 3 DID YOU LEARN ANYTHING ABOUT YOURSELF?
- 4 DID YOU LEARN ANYTHING ABOUT THE TEAM?
- 5 DO YOU FEEL LIKE YOU HAD FUN WITH YOUR TEAMMATES?
- 6 DID YOU FEEL COMFORTABLE SHARING ABOUT INFORMATION ABOUT YOUR PERSONALITY?



THE DEEP DIVE METHOD

IDEAL FOR SOLVING A TEAM PROBLEM



BEFORE YOU BEGIN, HERE ARE A FEW THINGS TO CONSIDER

There are many reasons why companies turn to the Deep Dive Method for their team building initiatives, but the most common is to **FIX A CULTURAL ISSUE WITHIN THE ORGANIZATION**. If this sounds like a problem you are facing, you've come to the right place!

This method is going to **require a complex assessment that can dig into both individual and team dynamics**. Because you are trying to solve a problem, the more comparisons you are able to make about the people on your teams, the better. Although you are selecting a robust assessment option, be sure to only share bite size pieces with your team for each session. You can easily overwhelm them if you present too much at once—especially in the beginning.

Because this method requires a more complex assessment, **a certified professional will most likely be required to interpret the results**. Keep this in mind when prepping and planning for your sessions. It might take longer to get your initiatives off the ground, but we promise it will be worth it.

This method is going to cost your organization more of an investment in both time and money. As a result, you are probably going to have to **convince the leadership within your company on the value of assessments** and how you see them fixing the issue you are facing. Without buy-in from them, it will be difficult to successfully launch your team building initiatives.



TIPS FOR APPROACHING LEADERSHIP

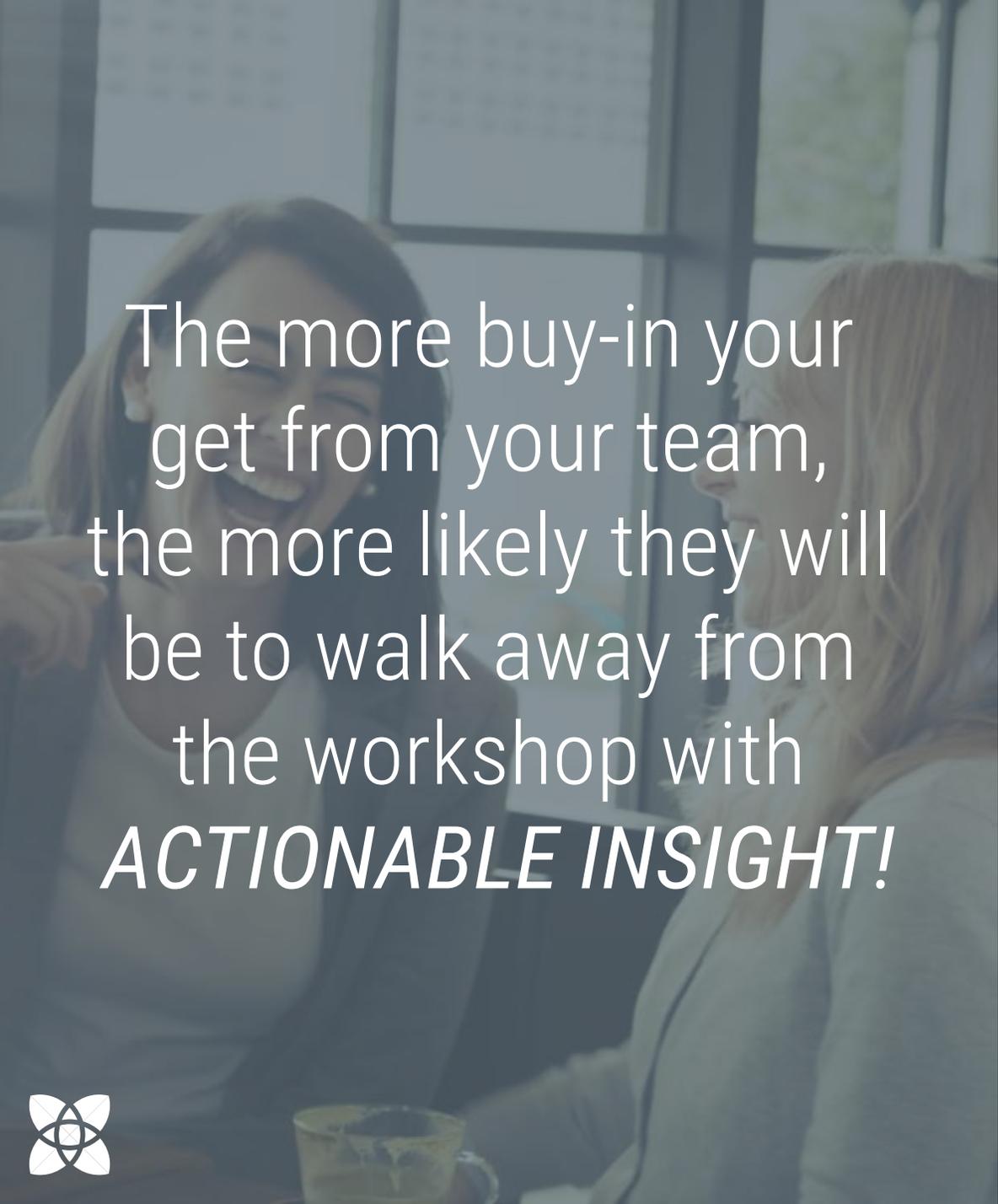
If you need some help convincing the leadership in your organization on the value of assessments, follow these quick tips.

Trust us, this investment will pay off big in the end! Your teams will not only be more satisfied, but also more engaged and productive in the end!

ABOUT ASSESSMENTS

- 1 CONVINCING THEM THAT SOFT SKILLS ARE AN IMPORTANT ASPECT OF SUCCESSFUL, PRODUCTIVE TEAMS.**
- 2 SHARE ANY IMPORTANT FACTS YOU HAVE GATHERED ABOUT ASSESSMENTS AND HOW THEY ARE USED BY OTHER COMPANIES.**
- 3 START WITH THE “SHORT AND SWEET” METHOD TO HELP DEMONSTRATE THE VALUE OF ASSESSMENTS AND WHAT THEY CAN DO FOR YOUR TEAMS.**





The more buy-in you get from your team, the more likely they will be to walk away from the workshop with ***ACTIONABLE INSIGHT!***

1 GENERATE EXCITEMENT & LEARN ABOUT TEAM ISSUES

If you are trying to fix a cultural issue within your organization, you may have problems with employee morale. Before you facilitate your session, you will want to take several weeks to generate excitement about team building together. Think of it as an internal marketing campaign that you're running with your employees. This will help energize your team and increase the likelihood that they will approach your session with an open mind. ***The more buy-in you get from your team, the more likely they will be to walk away from all of this with actionable insight.***

One of the first things you should do is let the team know that you recognize there is a problem and are committed to working with them to fix it. This will demonstrate to the team that you are on their side and help you build trust with them prior to the session.

Next, you'll want to ***conduct interviews with each member on the team to get specific insight into the problems they may be facing.*** When you are on the outside looking in, it can often be hard to gauge how severe a cultural issue may be. Getting one-on-one time with the people who are dealing with it head-on can help you get to the heart of the matter more quickly.



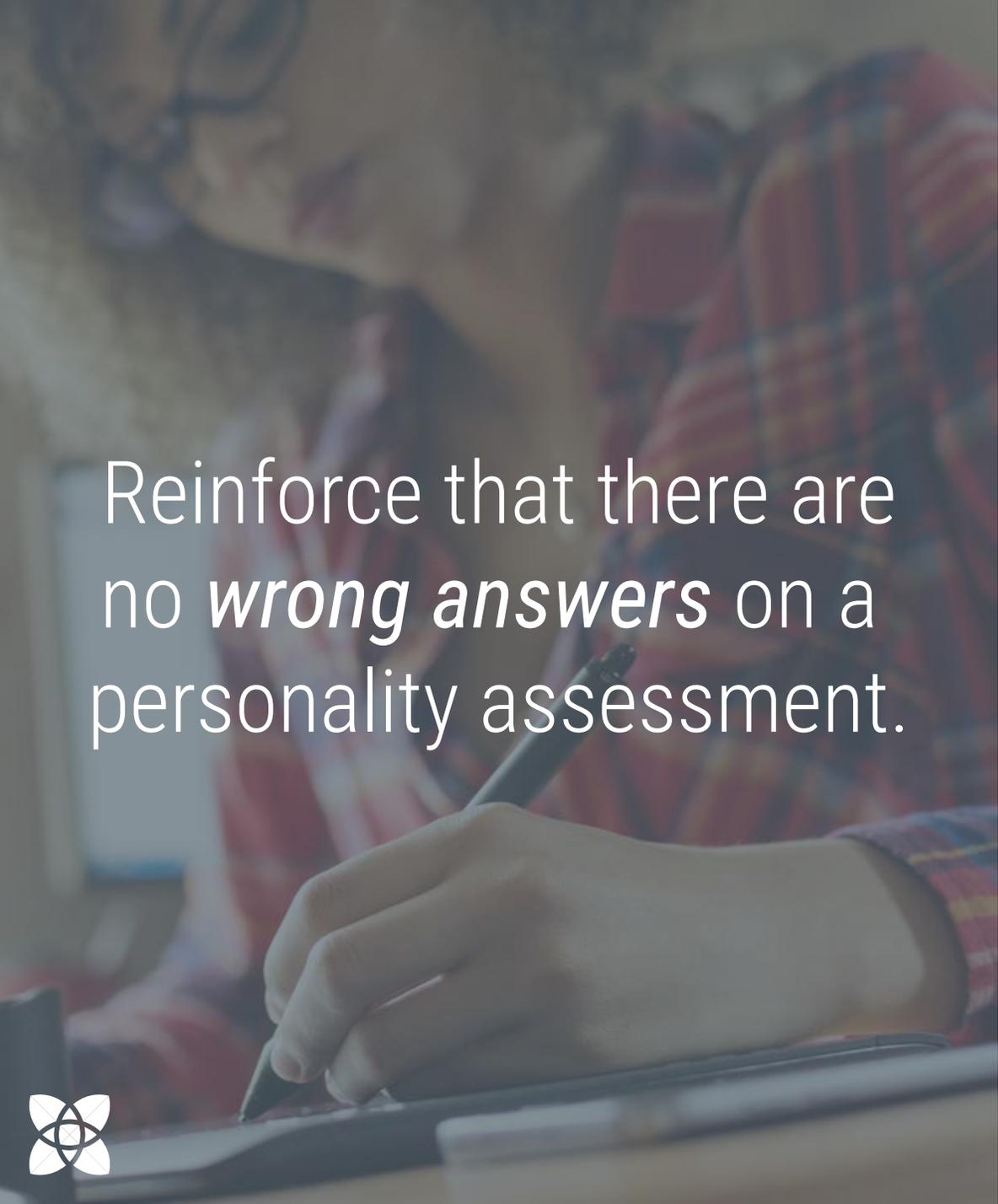
During these interviews, you want your employees to feel comfortable opening up to you. One of the best ways to do this is to **reinforce that they are in a safe environment and that there is no “right” personality type**. The more information you are able to get out of these interviews, the easier it will be for you to determine which reports to pull from the assessment.

You'll then want to **share a brief overview of the assessment they will receive and how you see it fixing the overall team problem they are facing**. Be sure to mention exactly how you plan on using the assessment—and remember to honor that! You'll quickly lose the trust of your team if you use the assessment in a way that is different than what was originally communicated to them.

INTERVIEW QUESTIONS

- 1 WHAT DO YOU LIKE ABOUT YOUR CURRENT POSITION?
- 2 WHAT DO YOU DISLIKE ABOUT YOUR CURRENT POSITION
- 3 HOW WELL DOES YOUR TEAM COLLABORATE ON PROJECTS?
- 4 WHAT IMPROVEMENTS COULD BE MADE WITHIN YOUR ORGANIZATION?
- 5 WHAT THREE THINGS WOULD MAKE YOUR JOB BETTER?
- 6 WHAT MOTIVATES YOU?





Reinforce that there are no *wrong answers* on a personality assessment.

2 ADMINISTER THE ASSESSMENT

Before you administer the assessment, you need to *share with the team the goals you are looking to achieve from the session and why*. A little transparency can go a long way, and being open and honest with your team can help you continue to build trust with them.

Since the data collected from the assessment will most likely be self-reported, it is important your team is honest when they fill out the questionnaire. Again, reinforce that there are no “wrong answers” to their personality. This will ensure you have accurate data to work with during your session. Be sure to share with them that you are trying to help them solve a problem. Making it known that you are on their side will help motivate them to be open and honest during this process.



3 PROVIDE FEEDBACK

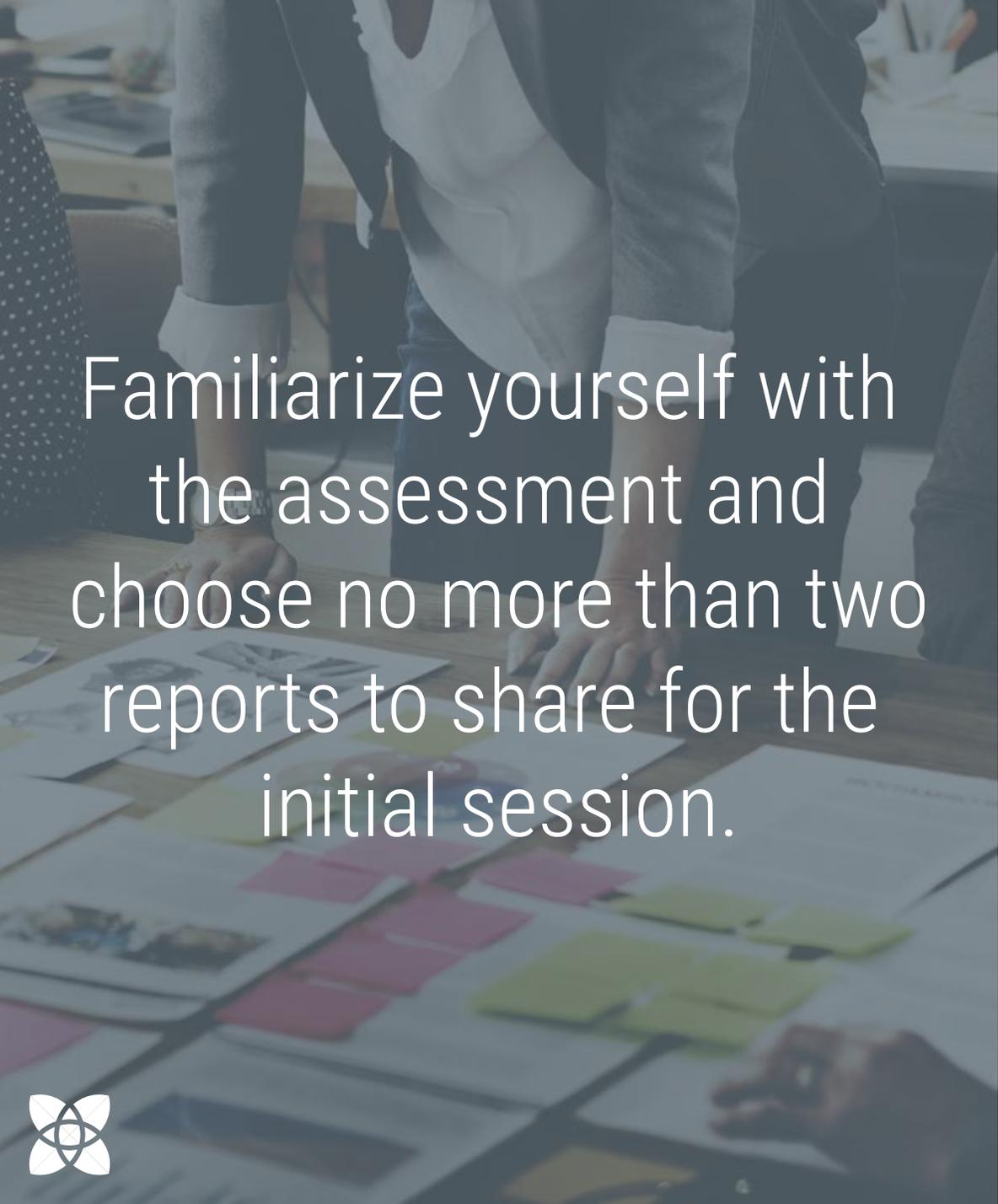
Next, you will have to make sure *each member of your team has a one-on-one conversation about their results*. Chances are, the assessment you selected will require the results to be *professionally-interpreted*, and as a result, you will likely need someone from your organization to attend certification training. Once completed, that person will be able to champion the feedback process for you. If you are unable to get an internal employee certified, you could also enlist help from an outside consulting firm to provide the assessment feedback.

Want our advice? You should opt to have the facilitator of the team building session debrief the results with each member on your team. Every assessment comes with its own set of reports, concepts, and unique terminology. Since this will likely be your team's first exposure to the assessment and their results, it will be helpful for them to have the one-on-one interaction to ask questions or get additional insight before you get together as a group. Your session will run much more smoothly if you are able to iron out all the wrinkles upfront.



Give your team the chance to ask questions or get additional insight about their personality profiles prior to the workshop.





Familiarize yourself with the assessment and choose no more than two reports to share for the initial session.

4

SELECT REPORTS & FORMULATE DISCUSSION QUESTIONS

Now that you've had a chance to understand the issues your team is facing, it's time to face them head on!

Ideally, if you are the one facilitating the team building session, you are also the one who is certified to interpret the results within your organization. This is going to be helpful because you will already be familiar with the terminology and concepts of the assessment. If you are not certified, be sure to familiarize yourself with these topics. It may be helpful to ***practice having conversations with others about the assessment prior to the session.*** You want to make sure you are coming across as a subject matter expert while facilitating the group session. There is no easier way to lose your audience's attention than to be unsure of the concepts you are presenting.

Next, ***familiarize yourself with the different reporting options your assessment offers and choose no more than two reports to share with the group for the initial session.*** You want to start small, and slowly work towards the bigger insights as to not overwhelm them. Be sure to keep your interviews with the team at the top of your mind and select reports that will help address their frustrations.



DISCUSSION QUESTIONS

You'll then want to acquaint yourself with the results of each person on the team and *formulate a set of questions that you'd like to discuss with the group.*

Because the goal of this session is to solve a problem, you want to be sure there are plenty of in-depth conversations that directly address the problem. However, *peppering in several activities during your time together can also help to lighten the mood, reinforce the assessment's concepts, and encourage your team to work together.*

- 1 DO YOU AGREE WITH THE RESULTS? WHY OR WHY NOT?
- 2 CAN YOU GIVE AN EXAMPLE OF A TIME YOU MAY HAVE DEMONSTRATED A BEHAVIOR THAT REFLECTS YOUR RESULTS?
- 3 WHAT ARE THREE STRENGTHS YOU CAN INFER ABOUT THE GROUP?
- 4 CAN YOU IDENTIFY ANY BLIND SPOTS WITHIN THE TEAM? IF SO, WHAT ARE THEY?
- 5 WHERE DO YOU THINK THE TEAM HAS ROOM TO GROW?
- 6 HOW MAY YOUR PERSONALITY PROFILE IMPACT THE PROBLEM YOUR TEAM IS FACING?
- 7 IS THERE ANYTHING YOU WERE ALREADY AWARE OF? IF SO, CAN YOU EXPLAIN?
- 8 WAS THERE ANYTHING THAT SURPRISED YOU? HOW SO?
- 9 HOW ARE YOU GOING TO LEVERAGE HEIGHTENED SELF-AWARENESS MOVING FORWARD?



5 PREPARE FOR THE SESSION

There is also some prep work that needs to be done the day of the session.

Here's a checklist that can keep you organized:

WORKSHOP CHECKLIST

- BRING ANY MATERIALS YOU MAY NEED WITH YOU INCLUDING:**
 - *PRINTED COPIES OF INDIVIDUAL REPORTS*
 - *NAME TAGS (IF THE PARTICIPANTS DON'T KNOW EACH OTHER)*
 - *PROPS FOR ACTIVITIES YOU HAVE PLANNED*
 - *DIGITAL COPIES OF REPORTS IF YOU'D LIKE TO SHARE ON PROJECTOR SCREEN*
- ARRANGE TABLES INTO GROUPS AND DECIDE IF YOU'D LIKE THE TEAM TO SIT IN A PREDETERMINED LOCATION.**
- SET UP FOR ANY ACTIVITIES THAT YOU WILL BE CONDUCTING DURING THE SESSION—THIS WILL ALLOW FOR A SEAMLESS TRANSITION BETWEEN DISCUSSION AND ACTIVITY.**
- DISTRIBUTE ANY MATERIALS THE PARTICIPANTS MAY NEED INCLUDING PENCILS, PAPER, PROPS, ETC.**



EXAMPLE ACTIVITY: SEEING THE OTHER SIDE

The goal of this activity is to encourage your team to be more understanding of those around them. It is helpful to uncover the concept of personal bias, and how it may be hard to see things from another person's point of view. Here's how it works:

1

Most assessments will categorize people into specific groups based on a set of traits such as extroversion, introversion, openness, and conscientiousness to name a few. Separate your team into whichever behavioral groups are predetermined by your assessment of choice.

2

Have the team write down at least 10 characteristics or traits about themselves.

3

Next, have the team share their answers with the group and facilitate a conversation about why they see themselves that way.

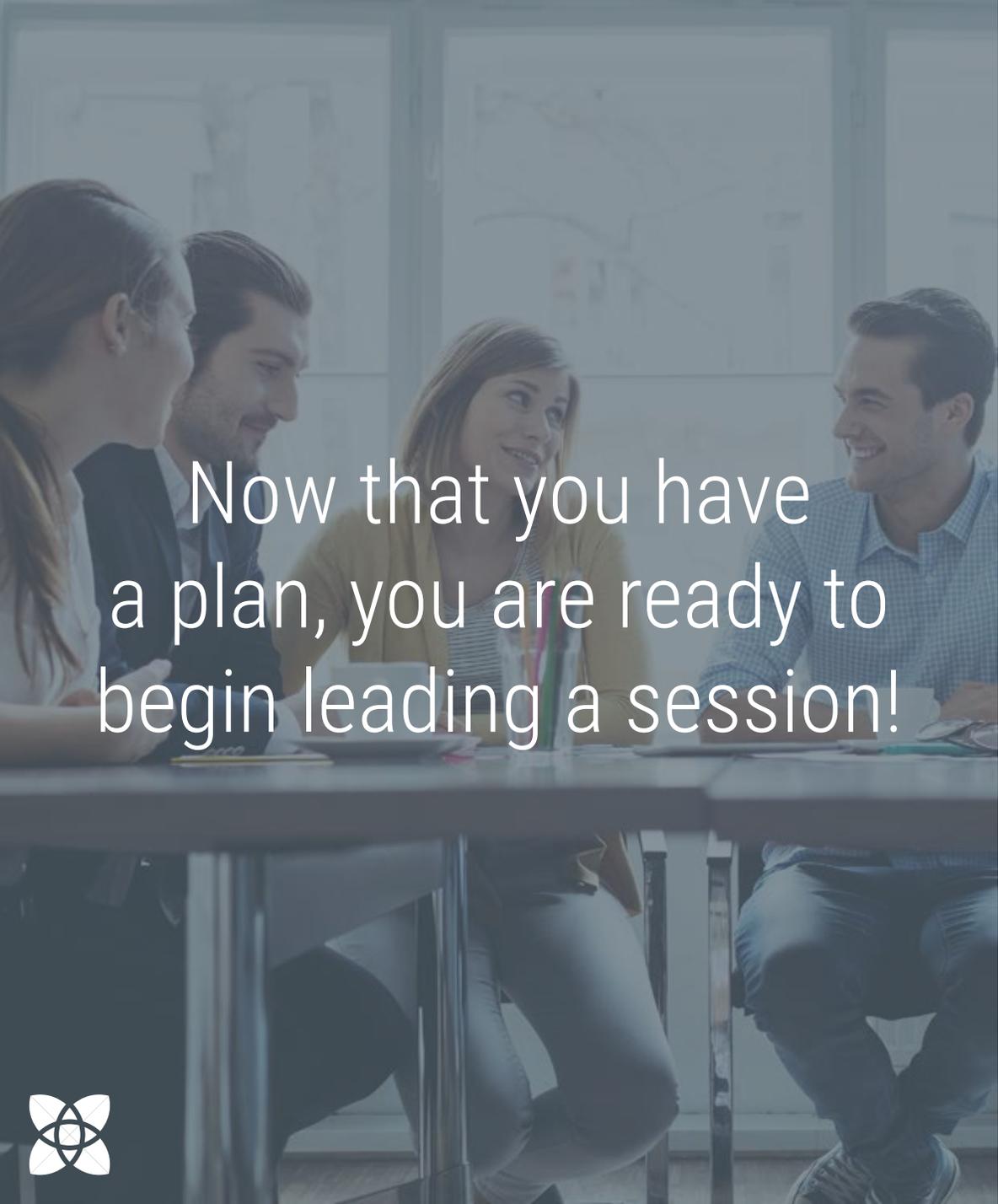
4

Then, have each team member write down characteristics about another group in the room—ideally the group that is most opposite of their style. This can lead to some very interesting revelations as, more often than not, the characteristics used to describe others will often have a more negative tone than those used to describe themselves. For example, someone who is introverted might think of themselves as thoughtful, compassionate, or emotional. However, an extrovert may describe the same person as lonely, anti-social, or unproductive.

You'll also want to plan out any activities you'd like to include in the session. This is a great way to get your team more engaged and energized about their results.

Check out this sample activity that you can use with your group:





Now that you have a plan, you are ready to begin leading a session!

6 FACILITATE THE TEAM BUILDING SESSION

Now that you have a plan, you are ready to lead your team building session!

Begin by *reviewing the goals you are looking to achieve from the session and why*. This should help your team prioritize their thoughts and encourage more constructive conversations that focus on the issue at hand.

Next, provide an *overview of the assessment's unique terminology and concepts*. While your team should already be familiar with much of this information from their individual feedback session, it is still important to reinforce these concepts—especially together as a group. It's a great chance for everyone to share their own unique personality profile and understand how they fit in with the rest of the group.



You will then want to *jump into your discussion questions*. Because you are looking to solve an issue, your team may be hesitant to open up at first, especially if they feel threatened. It can be helpful for you as the facilitator to share your personality profile first. This can help break the ice and gives the conversation a starting point.

Be sure to be mindful of the group and their participation. You want to make sure everyone has a chance for their voice to be heard. If you notice someone pulling away from the discussion or becoming disengaged, try to wrap them back in to the conversation. Chances are, that person might feel uncomfortable about one of their scores or may find it difficult to share with the group.

Remember to break up the discussion with activities! This is a great way to lighten the mood and get your team working together to solve a problem.



THINGS TO KEEP IN MIND

1 START SMALL, WORK BIG

You don't need to dig into the core of your team's inner-workings in the first session. Remember, to effectively implement assessments into your team building initiatives, and in turn contribute to that stellar employee experience, you need to get the team together regularly. That gives you plenty of time to get the ball rolling and with each subsequent session, you can dive a little deeper.

2 ASK OPEN-ENDED QUESTIONS

One way to ensure a successful session is to encourage conversation, and you can't do that by only asking yes or no questions. Assessments are a great starting point for people to have *deep discussions about what they expect and need from the environment around them*—the key is motivating them to open up!

3 KEEP IT SHORT AND SWEET

Your team building session doesn't have to last all day. In fact, *if they are short, you will have an easier time keeping the group engaged with the material*. It will also be less of a time commitment for your company when trying to schedule regular meetups.

7

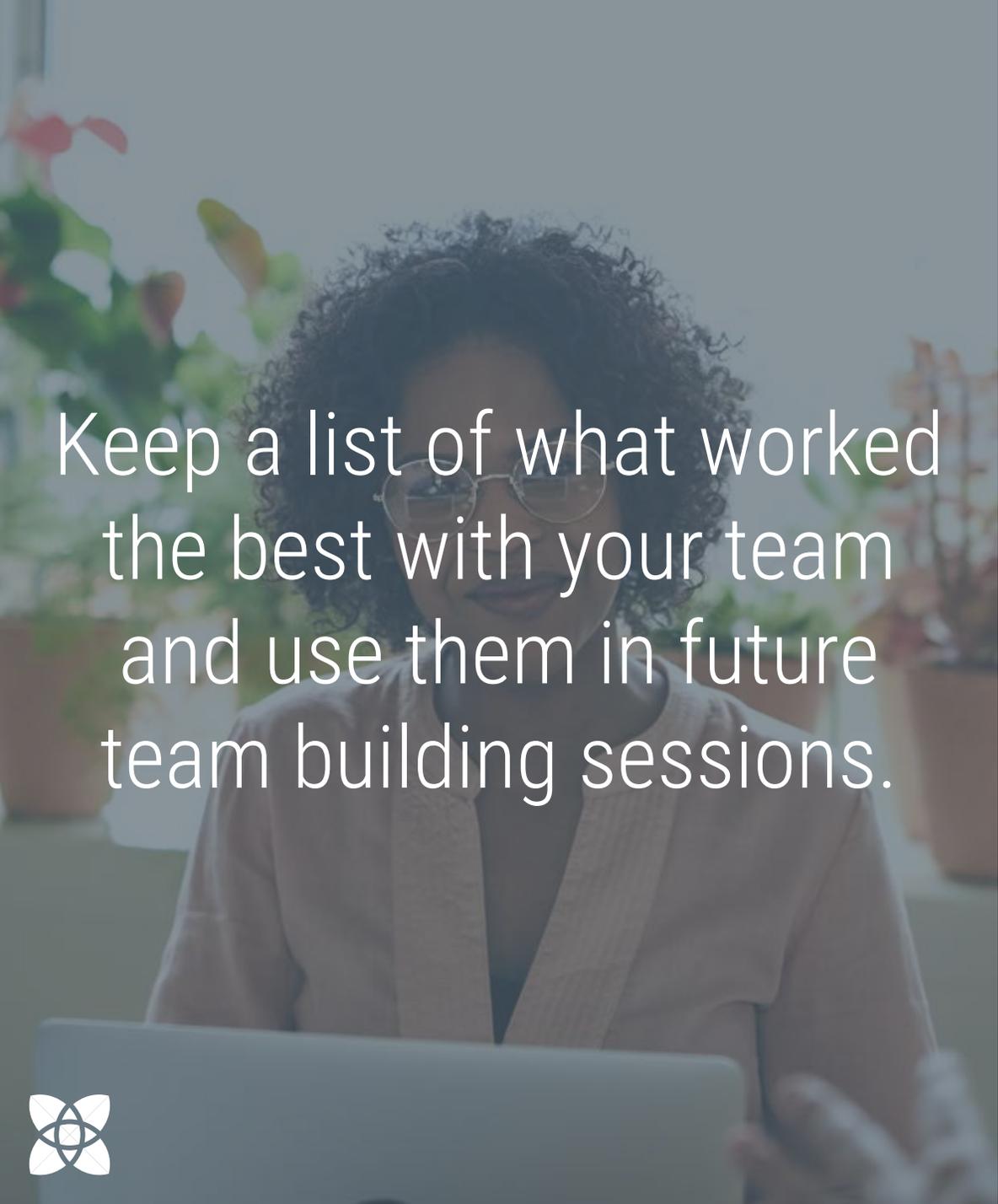
GET FEEDBACK AND MAKE PLANS FOR THE NEXT SESSION

After you finish your team building session, you'll want to get feedback from the group. This is going to be a key piece of information that will help you to better tailor your future team building activities to the needs of the group.



FEEDBACK QUESTIONS

- 1** WHAT DID YOU GAIN FROM THE SESSION?
- 2** WHAT ACTIVITY HAD THE BIGGEST IMPACT ON YOU?
- 3** WERE YOU ABLE TO WALK AWAY FROM THE SESSION WITH ANY ACTIONABLE INSIGHT? IF SO, EXPLAIN.
- 4** HAVE YOU NOTICED ANY CHANGES IN YOURSELF SINCE THE SESSION? IF SO, WHAT ARE THEY?
- 5** HAVE YOU NOTICED ANY CHANGES IN THE TEAM SINCE THE SESSION? IF SO, WHAT ARE THEY?



Keep a list of what worked the best with your team and use them in future team building sessions.

Once you get feedback from everyone in the group, you can get a sense for what worked and what didn't. **Keep a list of the things that worked the best with your team and use them in future sessions.** For example:

1. **WERE THEY MOTIVATED BY TEAM INTERACTION OR INDIVIDUAL REFLECTION?**
2. **DID THEY ENJOY THE ACTIVITIES OR PREFER DISCUSSION?**
3. **DID THEY LIKE LEARNING ABOUT THEIR INDIVIDUAL RESULTS OR HOW THEY RELATED TO THE GROUP?**

For any positive revelations that came out of the session, be sure to keep them at the top of mind. **The goal is to continue to have conversations about personality and build a stronger team.**

You'll also want to keep a list of any topics that might need additional reinforcement within the group. You will have the opportunity to touch on these again in future sessions.

Have your next session scheduled by the end of your first one so people can look forward to it. Also, at the next session, you can ask them how their epiphanies from the first session impacted team dynamics.





Remember, be sure to **KEEP THE MOMENTUM GOING!**

Our advice is to schedule short, but frequent team building sessions in the beginning as a way to continue to **REINFORCE CONCEPTS** and keep the **TEAM ENGAGED.**

Once you've begun to notice improvement in the overall cultural issue you are looking to fix, you can begin to schedule your sessions with more time in between.





CHAPTER SIX

KICK IT TO THE CURB

OVERCOMING THE BARRIERS TO MOVING FORWARD



OVERCOMING TEAM OBSTACLES

WE UNDERSTAND THAT SOME PEOPLE MAY BE HESITANT TO TRUST ASSESSMENTS—AND WITHOUT BUY-IN, IT CAN BE DIFFICULT TO LEAD A CONSTRUCTIVE SESSION. HERE ARE SOME COMMON REACTIONS THAT YOU MAY RUN INTO FROM YOUR TEAM, AND TIPS ON HOW YOU CAN ADDRESS THEIR FEARS.



NOT AGREEING WITH THEIR RESULTS

Any good behavioral assessment will shed light into each respondent's unique strengths as well as their potential weaknesses. Because assessments touch on sensitive areas, it can be difficult for some people to accept and share the behaviors that may seem less desirable.

If you run into this situation, there are a few things you can do:

- 1** Emphasize that there is **NOT ONE "RIGHT" PERSONALITY** and that everyone has their own unique set of strengths as well as potential blind spots.
- 2** **ASK THEM TO SHARE EXPERIENCES** that show how the score description may be incorrect or inaccurate.
- 3** **PEER FEEDBACK IS ALWAYS HELPFUL**—after all, this activity is about growing stronger together! Ask their close peers to share examples where that person may have demonstrated that particular behavior. If you are using a comprehensive assessment, chances are the team will have more than one example to share.
- 4** **DON'T FOCUS ON NEGATIVE OR STRESS BEHAVIORS** early in the team building series—start with the positive personality traits and save the more difficult conversations for later sessions.

NOT COMFORTABLE SHARING RESULTS

Any good behavioral assessment will shed light into each respondent's unique strengths as well as their potential weaknesses. Because assessments touch on sensitive areas, it can be difficult for some people to accept and share the behaviors that may seem less desirable.

If you run into this situation, there are a few things you can do:

- 1 START WITH SHARING YOUR RESULTS FIRST.** As the facilitator, this demonstrates that you are willing to be vulnerable with the group which helps to break the ice.
- 2 SHARE THE GOALS** of the team building session with the group and what you are looking to accomplish from it.
- 3** Be sure to emphasize that the group is in a **SAFE AND TRUSTING ENVIRONMENT**—if you're expecting your employees to share personal details about themselves, it is important they feel their responses won't be judged. Again, be sure to stress that all personalities have pros and cons, and that there isn't a "right" way to be.

Please note: If after trying these approaches, an employee is still very uncomfortable, they may wish to opt out of the team building. As an HR professional or manager, you'll need to weigh the benefits of them engaging in the session with the potential problems of them feeling forced to do something they aren't comfortable with.



SKEPTICISM ABOUT ASSESSMENTS

When trying to facilitate a constructive team building session, it can be hard to convince those who are skeptical of assessments that the results are valid—let alone have them buy into the information you are trying to share with them. You may run into this issue with people who do not value soft skills development, however these individuals may be the ones who would benefit most from the team session.

Here are some helpful ways to frame assessment feedback sessions to address these concerns:

- 1** If you are using a scientifically-validated assessment (which you should be), tell them about it! This is an especially critical piece of information for people who are skeptical of soft skills development as it can help them buy-in to the goals of your team building initiatives. When an assessment is backed by science, there will always be **DOCUMENTATION TO SUPPORT ITS VALIDITY**. If you anticipate this ahead of time, don't be afraid to ask the assessment company for a copy. They would be more than happy to share it with you!
- 2** **AGAIN, TEAM FEEDBACK IS CRUCIAL.** If someone is skeptical of assessments in general, chances are they also will disagree with their results. Ask the team to share examples of a time where the person acted in a way that is reflective of their personality. The more examples you are able to pull from the group, the better chance you will gain that individual's buy-in.
- 3** Because most assessments are self-reported, people may think they can "beat" the system. However, that is simply not true. Before administering an assessment, emphasize that there is no "right" personality, which in turn also means that there are **NO IDEAL ANSWERS TO THE ASSESSMENT**. Additionally, since you should be using a scientifically-validated assessment, most people shouldn't be able to outsmart it. Magic, right?





FACING PERSONAL ROADBLOCKS

AS THE FACILITATOR, YOU MIGHT ALSO RUN INTO SOME ROADBLOCKS THAT COULD MAKE IT HARD FOR YOU TO LEAD AN OBJECTIVE, CONSTRUCTIVE SESSION. HERE ARE SOME TIPS TO HELP YOU KEEP AN OPEN-MIND AND OVERCOME THESE OBSTACLES.



NOT COMFORTABLE SHARING RESULTS

Often, if you are the one facilitating the session, you are also the one who is most in tune with the assessment, the way it works, and your own personal assessment profile. It is important to keep your personal knowledge, bias, or filters out of the conversations with the group. While you want to share your results, you also want to refrain from saying it's the "right" way to be—and trust us, that takes practice! Remember, no one personality is better than another, and everyone is equipped with their own set of strengths as well as weaknesses.

Here are some tips that can make facilitating a session easier:

- 1 TAKE THE TIME TO REVIEW EVERYONE'S SCORES** in detail prior to the session. This will give you ample time to prepare the topics you want to cover and get a game plan together.
- 2 PRACTICE!** Whether you practice on a family member, friend...even your dog—it doesn't matter! Just practice giving a feedback and take the time to get fluent with the assessment's unique terminology.
- 3** When discussing assessment scores, try to refrain from saying things like "you will," "you are," "right," or "wrong." Rather, try to **USE LESS DEFINITIVE STATEMENTS** into your conversation like "you may," "you have a tendency to," or "at times you may find yourself."



MAINTAINING MOMENTUM WITH TEAM

So, you've led a successful team building session using assessments, and everyone loved it! But that was over a year ago, and since then people have either forgotten what they learned or have since left the company. This is not an ideal situation! *To truly get the most out of assessments and to really contribute to the employee experience, conversations about personality need to be ingrained into the fabric of your company culture.* This will take some time and commitment, but we promise it will be well worth it!

Here are a few things you can do to keep the momentum going in between team building sessions:

- 1** Have everyone **HANG UP THEIR PERSONALITY PROFILES (ASSESSMENT RESULTS) IN THEIR OFFICE.** This can serve as a daily reminder for your team about their unique strengths—and keeps your team building session at the top of their minds. The scores can also act as a visual reminder to others about what they can expect from the people on their teams as well as what is expected of them.
- 2** **WEAVE CONVERSATIONS ABOUT PERSONALITY INTO YOUR EVERYDAY CONVERSATIONS.** One of the best ways to do this is to take 5 minutes before each meeting to check-in with one another—discuss how the week is going, go over any exciting projects, or discuss how the epiphanies from the first team building session is impacting their productivity. You'd be surprised at how much of an impact this can make!
- 3** **HAVE EVERY NEW HIRE TAKE THE ASSESSMENT**—this will be the difference between hosting a single, successful team building session and building a culture that emphasizes the importance of self-awareness.





CHAPTER SEVEN

A QUICK STORY ABOUT A MONKEY

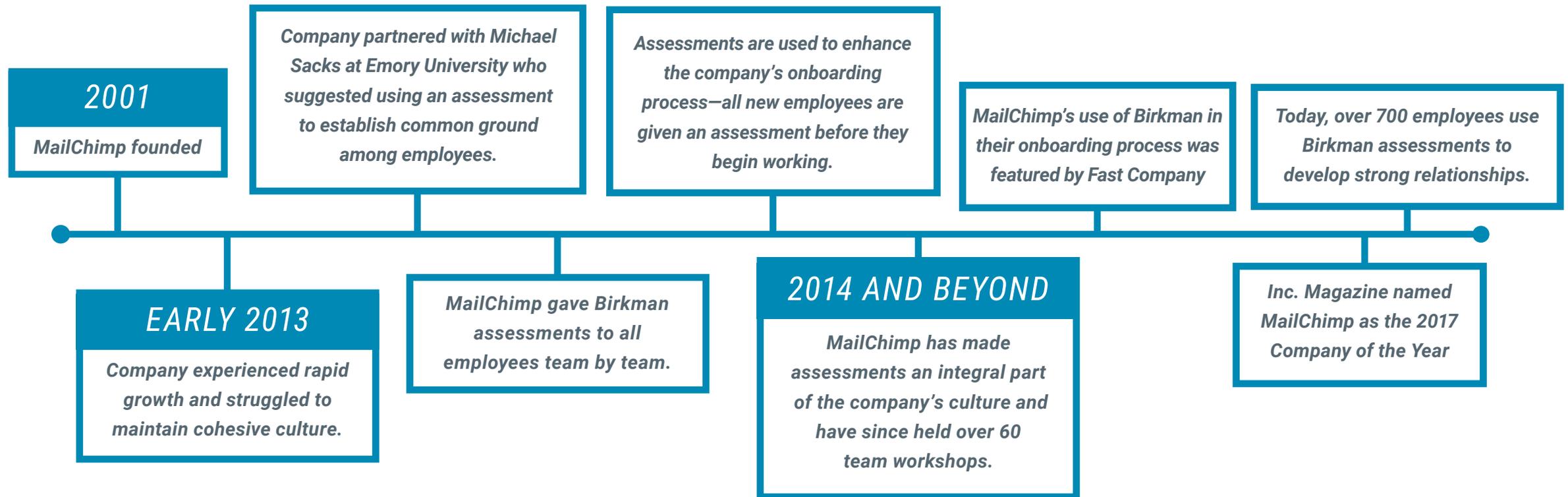
A SHINING EXAMPLE OF ASSESSMENTS DONE RIGHT



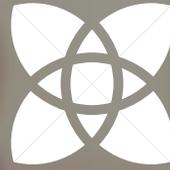
Although this story isn't about a real monkey, it is about **MAILCHIMP**, an email marketing company who wanted to ensure they **MAINTAINED THEIR CULTURE** during a period of rapid growth.

Take a look at the following page to learn how they went from a small startup company, to one of the largest marketing automation platforms in the world—all while using assessments to maintain an amazing **EMPLOYEE EXPERIENCE** for their team.

THE TIMELINE OF MAILCHIMP'S SUCCESS USING THE BIRKMAN METHOD IN THEIR ONBOARDING PROCESS



Interested in reading the full Case Study? Check it out [here!](#)



CHAPTER EIGHT

CONNECTING THE DOTS

THE TEAM BUILDING CHECKLIST & BEST PRACTICES

TEAM BUILDING CHECKLIST

Take a look at the following statements. For each one that applies to you, give yourself the point value associated with the statement. Once you are finished, add up your scores to determine the level of investment your organization will want to make in assessments for team building.

	<i>POINTS</i>
<input type="checkbox"/> There is clear evidence of a communication problem on the team.	4
<input type="checkbox"/> Employees working remotely feel disconnected.	4
<input type="checkbox"/> My company recently experienced organizational change.	4
<input type="checkbox"/> There is conflict within the team.	4
<input type="checkbox"/> Employees are not engaged or have low morale.	4
<input type="checkbox"/> My organization is restructuring; we need to assimilate new team members.	4
<input type="checkbox"/> The leadership in my organization is willing to allocate resources towards team development.	2
<input type="checkbox"/> I believe people in my organization would have an open mind about using assessments.	2

<input type="checkbox"/> I have at least 2 hours to spend on my initial team building session.	1
<input type="checkbox"/> I am able to spend \$50-\$100+ on each employee for team building.	1
<input type="checkbox"/> There is a budget within my organization for me to attend training or professional development.	1
<input type="checkbox"/> The leadership in my organization believes in soft-skills development.	1
<input type="checkbox"/> We have ongoing opportunities for team building.	1
<input type="checkbox"/> We can spend 45 minutes to meet with employees to share assessment results.	1
<input type="checkbox"/> The team feels that team building is worth their time.	1
<input type="checkbox"/> The team is frustrated with their roles or teammates.	1
<i>TOTAL</i> _____	



WHERE DOES YOUR SCORE FALL IN THIS SPECTRUM?



THE SHORT & SWEET METHOD

LESS INVESTMENT, LESS REWARD

THE DEEP DIVE METHOD

GREATER INVESTMENT, GREATER REWARD

Depending on where you fall, you'll be able to determine the path you'll likely need to take to accomplish your team building goals.





TEAM BUILDING BEST PRACTICES

1

The key to creating an unbeatable culture within your organization is to **FOSTER STRONG RELATIONSHIPS** between the members on your team.

2

Assessments are a popular option to enhance team building as they provide a platform to **UNDERSTAND THE COMPLEXITIES OF INDIVIDUALITY** and how it can influence relationships.

3

Before you select an assessment, be sure to **ESTABLISH GOALS** that outline what you are looking to accomplish and why. This will give your sessions direction, and ensure you are able to make the biggest impact on your team.

4

There are a lot of assessments to choose from and the number of choices can feel overwhelming. To streamline your search, be sure to **KEEP YOUR GOALS AT THE TOP OF YOUR MIND**. This will help you determine how in-depth your assessment will need to be, the types of reports it should offer, and the breadth of information you'll need to accomplish your goals.

5

NOT ALL ASSESSMENTS ARE CREATED EQUALLY and it is critical you take time to find one you can trust. While free options may feel like a tempting solution, they should only be considered if you do not need specific, actionable results from your team building sessions.





6

Decide how you should facilitate your workshop with **two questions**:

- Do I need a quick activity that will get my team together?
- Do I need to address a cultural, team, or individual problem within my organization?

7

The **“short & sweet”** Method:

- **Ideal for quick team building workshops.**
- Utilizes assessments that provide high-level personality data.
- Requires the least amount of investment from your organization.
- Provides the team with the lowest amount insight into their personality.

8

The **“deep dive”** Method:

- **Ideal for solving a team problem.**
- Utilizes assessment that provide in-depth personality data.
- Requires more investment from your organization.
- Provides robust personality data to help the team collaborate better.

9

Be sure to **keep the momentum going!** Host short, but frequent team building sessions to reinforce the assessment’s concepts and keep the team engaged.

10

Face any roadblocks head on—you can easily lose the group if you don’t address their concerns.





With more than 65 years of proven reliability and validity, The Birkman Method is a scientifically developed, multi-dimensional assessment that combines behavioral and occupational data to better understand oneself and others—both in and out of the workplace. The scalable reporting options can strengthen and enhance any team—no matter what you are looking to achieve!

WANT TO LEARN MORE ABOUT OUR ASSESSMENT AND WHAT IT CAN DO FOR YOU AND YOUR TEAMS? TALK TO US!

sales@birkman.com • 1-800-215-2760 • birkman.com



INDEX

1

2017 GLOBAL HUMAN CAPITAL TRENDS <https://dupress.deloitte.com/dup-us-en/focus/human-capital-trends/2017/improving-the-employee-experience-culture-engagement.html>

2

STATE OF THE AMERICAN WORKPLACE REPORT <http://news.gallup.com/reports/199961/state-american-workplace-report-2017.aspx>

3

CPP HUMAN CAPITAL REPORT https://shop.cpp.com/Pdfs/Cpp_Global_Human_Capital_Report_Workplace_Conflict.pdf

4

PERSONALITY ASSESSMENT <http://nobaproject.com/modules/personality-assessment>

5

SHRM/ACT: JOB ANALYSIS ACTIVITIES <https://www.shrm.org/hr-today/trends-and-forecasting/research-and-surveys/Pages/2014-job-analysis-activities.aspx>

6

THE EMPLOYEE ENGAGEMENT LIFE CYCLE SERIES <https://www.kronos.com/about-us/newsroom/whos-boss-workplace-culture-hr-managers-and-employees-disagree-says-new-workforce>