

# Design a Right-Minded Team-Building Workshop



**12 Steps** to Create a Team  
That Works as One

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12 Steps to Create a Team That Works as One

*Do No Harm.  
Work As One.®*

By Dan Hogan  
Certified Master Facilitator

Dear Reader, This Sample gives you two very practical chapters:

- #3 – Root Cause
- #7 – Interviews that create the unique Punch List

...that help you help the team to Do No Harm and Work as One.

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# About Team-Building Facilitation

Team-building facilitation is both an **art** and a **science**.

*The “art” of facilitation* is your ability to interact well with teammates - in other words, your ability to lead by example.

When you exhibit Right-Minded Teamwork Attitudes & Behaviors (see a list of 30 below), you teach others emotionally mature teamwork behavior.

You show them exactly how to work and behave as a high-functioning, Right-Minded teammate.

If not...

Displaying egotistical or arrogant behavior inevitably angers teammates and creates teammate resistance. Not leading by example harms the team-building effort.

The best facilitators always keep improving their own interaction and communication skills. They know doing so helps them succeed and serve their teams better.

*The “science” of facilitation* is your knowledge of the best teamwork methods.

You understand how teams operate. You know how to approach problems strategically. You see the value of guiding teams through a continuous improvement process, like the 5 Elements of Right-Minded Teamwork.

But science isn’t just knowledge. It’s also a methodology in action.

It is successfully applying Right-Minded Teamwork’s 12 Steps to design a real-world, customized, practical team-building workshop.

And it’s about facilitating that workshop to produce significant, tangible results.



## **Succeeding as a Facilitator**

Facilitators apply their expertise within three specific functions:

1. Designing Workshops
2. Facilitating Workshops
3. Teaching in Workshops

The most successful facilitators are skilled in the art of communication and the science of facilitation. They readily integrate both into everything they do.

Successful facilitators also do not over-function. “Over-functioning” means doing way too much for teammates (usually things teammates need to do for themselves).

As the story goes, if you give a man a fish, you feed him for a day. If you teach him how to fish, you feed him for a lifetime. Teams need tools, not quick fixes. Be helpful, but don’t over-function.

Designing transformational, team-building workshops is an excellent place to start.

# Introducing the 12-Step Design Process

Your client wants help. You know their needs. How can you ensure you deliver a truly transformational workshop experience?

This book will teach you how to design practical, powerful team-building workshops using Right-Minded Teamwork's proven 12 Steps formula.

The 12 Steps Workshop Design Process includes three phases:

**Contract:** Designing the workshop (steps 1-9)

**Commence:** Facilitating the workshop (step 10)

**Carry On:** Keeping up momentum after the workshop (steps 11-12)

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**Contract:** Designing the Workshop

**Step 1:**

The team leader determines the workshop's purpose. Often, workshops focus on something the team needs to change or improve because teammates are not working well together.

**Step 2:**

The team leader connects with the team building facilitator to convey the workshop's purpose and potential outcomes. Both agree to follow Right-Minded Teamwork's 12 Steps Process.

**Step 3:**

The leader gives the facilitator permission to think of their initial desired outcomes as symptoms, allowing the facilitator to uncover root causes the leader may not have considered. It's not unusual between steps 3 & 7 to learn that what the leader said they initially wanted may not be what the team needs.

**Step 4:**

The facilitator creates and presents a 1<sup>st</sup> Draft Plan to the leader. The plan includes the initial set of workshop outcomes, an agenda, a Punch List of workshop topics, and an announcement plan.

**Step 5:**

The leader announces the workshop and prepares teammates. Teammates learn that the facilitator will interview them. By offering their input and perspective, they will participate in designing the workshop outcomes and agenda.

**Step 6:**

The facilitator conducts a Right-Minded teammate survey to help identify potential workshop outcomes.

**Step 7:**

The facilitator interviews all teammates, summarizing their collective views in the Punch List document.

**Step 8:**

The facilitator creates and presents a 2<sup>nd</sup> Draft Plan to the leader.

**Step 9:**

The leader and facilitator fine-tune and agree on the final outcomes and workshop agenda. Together, they distribute the agenda and begin preparing teammates for the workshop.

**Commence:** Facilitating the Workshop

**Step 10:**

The leader and facilitator conduct the workshop and achieve workshop outcomes.

Teammates agree to track their performance after the workshop. They agree on what they will track, how they will track it, and to whom they will report their progress. They agree to conduct team-building workshops every 90 days.

**Carry On:** Keeping Up Momentum

**Step 11:**

For the next 90 days, the team tracks their progress.

**Step 12:**

The leader and facilitator either begin designing the second workshop or transfer that responsibility to others.

If the facilitator is asked to design the next workshop, the cycle continues onward, beginning with Step 1 again.

As the cycle is repeated over time, the team grows and evolves together.

## **Step 3 – Uncovering Root Causes**

What the leader wants is not always what the team needs.

### **In This Step, You Have Two Tasks**

1. Reflect.
  - a. Assume the leader's outcomes are symptoms of team dysfunction. What could be the underlying or root causes of those symptoms?
  - b. Begin thinking about team exercises that will remove or transform those root causes.
2. Begin writing your first draft plan.

### **A (True!) Root Cause Story**

An incredibly good team leader once asked me, “Can you teach my team your three-day facilitation workshop... but in two days?”

I said yes, then asked, “What specifically are you wanting to achieve? What behaviors are you looking for?”

He told me, “Our team meetings are horrible, and if everyone knew just how hard it was to facilitate them, they wouldn't be so disagreeable and hard to get along with.”

I said, “Okay, how about letting me interview your teammates [Step 7], and then I’ll come up with a detailed plan [Step 8]?” He agreed to my proposed timeframe and plan forward.

(I opted to skip the team survey because I believed I could get enough information from the interviews.)

Taking the information I already knew, I created a 1<sup>st</sup> Draft Plan and gave it to him right away. I wanted to show him the desired outcomes for the team member interviews.

In the **Resources** section, you will find both 1<sup>st</sup> and 2<sup>nd</sup> Draft Plans. Note these are the actual 1<sup>st</sup> and 2<sup>nd</sup> plans I used with this team.

We identified the following first-draft outcomes:

- Discuss and agree on how to improve meeting effectiveness.
- Discuss and agree on how to improve team communications.

Next, I interviewed all 12 teammates, mostly engineers, and geoscientists. Unanimously, they agreed their meetings were horrible.

But unlike their leader, who felt everyone was disagreeable in meetings because they didn’t appreciate how hard it was to facilitate team meetings and encourage constructive conversation, the team’s view was very different.

Nearly every teammate said something like, “*Our meetings are so bad because when one person brings up a different opinion, others jump in, interrupting and arguing, and then aggressively saying things like, ‘That won’t work!’*”

After reflecting on the leader's initial outcomes and what I heard in the interviews, it was clear the leader's desired outcome for improvement with facilitation skill training was not the root cause of the team's challenges. The underlying problem was that this team did not know how to argue constructively. They simply weren't fighting fair.

So, I proposed the following approach for the two-day workshop.

### **Day 1**

- Dan will teach meeting facilitation and communication skills – 2 hours.
- Teammates will discuss and agree on how they will use those skills to present contrary opinions and resolve conflicts. This discussion will lead to the creation of team Work Agreements – 2 hours.
- The team will identify current conflicts and practice using the new Work Agreements to resolve them – 4 hours.

### **Day 2**

- The team will continue applying their Work Agreements to their specific conflicts: work ethic, customer service, and teammate roles.

The team leader loved the idea. So did his teammates. They had a remarkably successful workshop. They created three Work Agreements that, if they implemented them properly, would resolve their conflicts.

A few months later, I called the leader to inquire about how the team was functioning. He replied, “I wish I had brought you in six months earlier because not only are our meetings much better, but we’re making much better team decisions.”

*Want another true story? Look for **Another Root Cause Story** in the **Resources** section to read about a leader who asked me to improve leadership trust and help a poor-performing partner.*

## **A Simple Way to Find a Root Cause**

Let's use the story above as an example. What did the leader initially want? He wanted his teammates to learn how to facilitate meetings.

Now, let's reframe his desired outcome by assuming facilitation is not the true outcome but rather a symptom of his team's dysfunction.

If poor facilitation is the symptom, what causes it? Team conflict.

And what could cause a team, which works well together outside of meetings to experience team conflict while in meetings? What could be the root cause? No agreement on how to converse and argue constructively.

With the root cause identified, the solution is a Work Agreement.

In their Work Agreement, this team described how they all agreed to "argue nicely," fight fair, and engage in healthy conflict resolution during their team meetings.

Now, even when conflicts occur, the team has the tools and a mutual team Agreement to guide them and help them reach productive conclusions.

Though it wasn't what he originally asked for, the leader got what he wanted in the end. The teammates got what they wanted, too. And the team got what it needed. Success is all around.

## **A Mental Model for Identifying Root Causes of Conflict**

Let's say you see or hear about a team conflict. You immediately assume the conflict is a symptom and start to look for a root cause.

There are three levels to consider in this model:

1. Top-level: **Whats**

High-level team elements including vision, mission, and goals

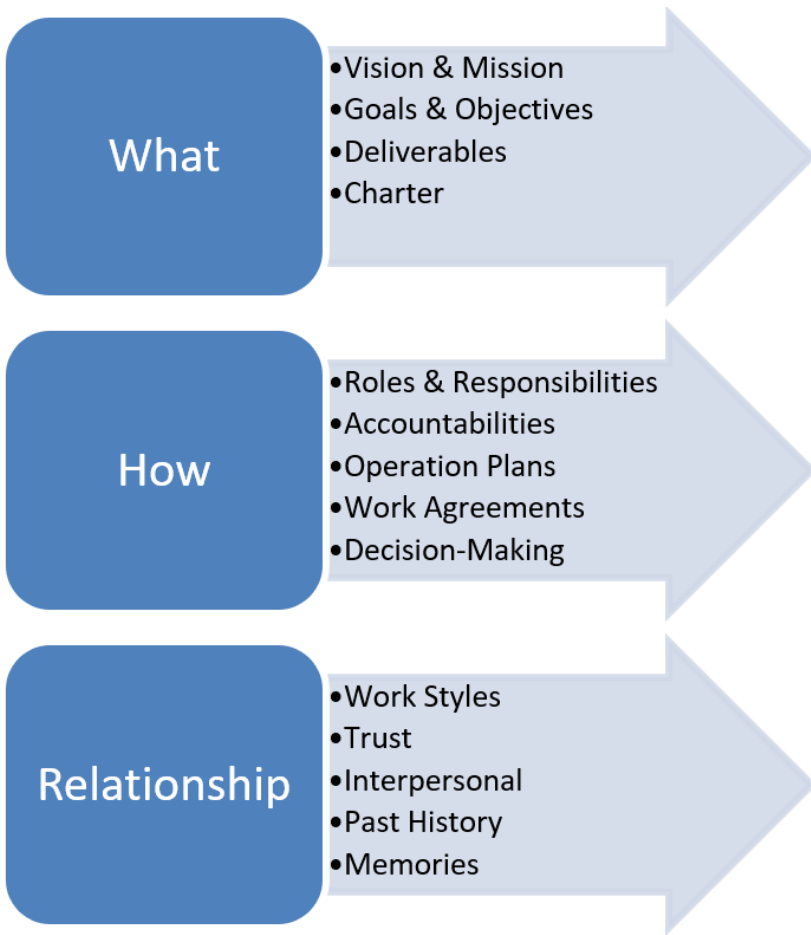
2. Mid-level: **Hows**

Processes, like roles and responsibilities; usually subsets of Whats

3. Base-level: **Relationships**

It occurs between people and often focuses on emotions and feelings.

## Identify Root Causes



Let's start at the base level.

Conflicts are first experienced or felt in **Relationships**.

Examples of Relationship conflicts include:

- work style clashes
- lack of trust
- poor interpersonal behavior
- negative history being dredged up

We now know most conflicts are symptoms of underlying root causes. So, if these conflicts are also symptoms, they must be caused by something else.

Most often, the “something else” that is not working is a **How**.

Examples of dysfunctional Hows include:

- lack of clear roles, responsibility, or accountability
- no clear team operating plans
- no clarity about how decisions are made
- no Work Agreements

Hows like these are often the cause of conflict in teammate relationships.

For example, if roles and responsibilities are unclear, specific teamwork tasks likely fall between the cracks. When those tasks are not completed, teammates blame others and no longer trust them to do their jobs. Only after teammates clarify roles and responsibilities can trust be rebuilt.

But sometimes roles are clear, and teammates still don't trust one another.

When that's the case, the mistrust must have a different root cause. It's time to move to the next level - the **What** - to see if the root cause lies there.

At the What level, you may discover a major disagreement within the team regarding the team's goals and objectives.

For example, if it turns out the leader strongly believes in a set of goals and objectives many teammates don't like, many teammates may lack trust in their leader.

Once you know whether your root cause exists at the How or the What level, you can suggest an effective solution. In this example, you'd suggest a vision, mission, and goals team-building workshop to correct the team's misaligned Whats.

*In the **Resources** section, **Another Root Cause Story** describes my root cause discovery of a What level problem with an architectural design firm - and our subsequent team-building workshop to address the issue.*

Many root causes behind team dysfunction and conflict exist at either the How level or the What level. But occasionally, root causes go deeper still.

Let's say the Whats and Hows are all in place, and all team members agree they are functional, but trust is still absent. If that's the case, the root cause may actually lie at the level of individual **Relationships**.

If that is the case, you, as the facilitator, will need to work with the leader to identify and individually coach teammates who are experiencing a lack of trust.

## Address Root Causes, Not Symptoms

**IMPORTANT:** Right-Minded Teamwork is about resolving root-cause issues, not addressing symptoms.

Team-building approaches that do not tackle root causes often backfire. If you missed it, see the section *From Worst to Best: Team-Building Exercises* at the beginning of this book on this topic. They may cause teams to falter or fall short of goals. They can even fuel the real issue behind the team's dysfunction instead of resolving it.

In our example, the well-meaning leader who asked if I could do a three-day workshop in two days came to me thinking he needed a training class. But if I had simply done what he asked, the team would have received unhelpful information, and the leader would still be struggling with the same issue. I would have failed both the team and the leader.

Instead, by looking for the root cause first, we ended up designing and executing a practical Right-Minded Teamwork workshop. We solved the underlying problem and delivered the leader's desired result... even though it wasn't what the leader initially asked for.

For this reason, it's best never to assume team leaders know the real problem. Many times, they are right, but before moving ahead, always verify the team leader's opinions using RMT surveys and teammate interviews.

You may be wondering whether it is okay to tell your team leader, "You're not always right."

The answer is, in short, yes.

Using your best communication skills, you can let the leader know that you must incorporate all teammate ideas into the final agenda while you start the design process with their outcomes in mind.

Remember, as a facilitator; you are primarily responsible for helping the team find and resolve root causes. It would be best if you had everybody's input to make that happen.

*You can say something like, "I'm sure you will agree that none of us is as smart as all of us, so it will be far better to have all team members' design input. It will create genuine excitement for achieving the workshop outcomes, rather than the resistance we might receive if we just design something without their input."*

With that said, if your team leader does not allow you to interview teammates and take the team's perspective into account, run the other way!

Do not facilitate the session. Politely explain that you are committed to Right-Minded Teamwork principles. You would not be acting with integrity if you did not adequately prepare.

### **Begin Writing the 1<sup>st</sup> Draft Plan**

Did you forget we're still in Step 3 of the 12 Steps to Design a Right-Minded Teamwork Team Building Workshop? Let's get back to it.

Now that you've uncovered root causes, it's time to make sense of what your team leader shared. Give yourself several days to complete this step. During this time, you might even call the leader to test a strategy or ask for clarification.

Once you feel clear, it's time to begin putting your plan together.

To get started, simply start writing. Your 1<sup>st</sup> Draft doesn't have to be comprehensive, but it must accurately reflect what the leader thinks they want.

*You can use the **1<sup>st</sup> Draft Team-Building Workshop Plan Agenda & Punch List** in the **Resources** section as a guide.*

Remember, your 1<sup>st</sup> Draft doesn't have to be perfect. You have until Step 9 to solidify your workshop outcomes. That means the outcomes discussion between you, the leader, and the teammates can evolve between now and then.

Let it be a natural process where you gradually add, edit, and even postpone some outcomes to address in future workshops.

At this point, you'll also want to give some thought as to how you will present your plan to the leader. You could email it the day before your meeting, or you could show up and present it. Which will suit your team leader better?

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You've reflected. You've started writing your plan. You're now ready for Step 4: Time to finish the plan and present it.

## **Step 7 – The Facilitator Interviews All Teammates**

With your survey summary in hand, it's time to dig a little deeper by interviewing individual teammates.

### **In This Step, You Have Three Tasks**

1. Interview all teammates.
2. Create the team's Punch List.
3. Identify other potential workshop outcomes.

## **Yes, Interviews Take Time - They're Worth It**

To design a successful RMT workshop, you must thoroughly understand what the teammates collectively believe. Interviewing is by far the best way to put this picture together.

Whatever *you* may think of the teammates right now doesn't matter.

What matters is what *they think of themselves*.

To truly help the team, you must first understand where they think they are. Knowing how *they view themselves* allows you to create the pathway to take them *where they want to be*.

Their collective answers highlight the team's strengths and flaws.

From the information you collect in this step, you will create and present more potential workshop outcomes in your 2<sup>nd</sup> Draft Plan. You will also propose exercises that reinforce their strengths and mitigate their flaws. You will find three exercises in the **Resources** section.

## Becoming an Excellent Interviewer

As you become a more effective interviewer, you will see how teammate interviews can teach you everything you need to know about designing and facilitating that team's workshop.

But you won't start as an expert, so be willing to practice and learn. You can test-drive your interviewing skills in almost any conversation.

### Interviewing Tips

- Interview all teammates and always interview one person at a time.
- Spread your interviews out over several days.
- Let each person know everyone's answers will be summarized in a Punch List, without attributing as to who said what. Everyone on the team will receive a copy.
- Share the leader's suggested outcomes and ask what the teammate thinks of them.
- Ask what they think of the survey's common themes.
- Ask which outcomes they believe should be achieved in the workshop and which ones could be addressed in future workshops.
- Ask, "What would cause this workshop to fail?"
- Remember, you are looking for root causes, not just symptoms. You'll start formulating your 2<sup>nd</sup> Draft Plan ideas as soon as you complete your first interview. It's okay to start testing some of your ideas in later teammate interviews.



## Write Punch List Items as Questions

When writing your Punch List, it's more effective to present the topics as questions.

Why? Because it helps **create mutual accountability**.

Let me elaborate.

If you recall the Root Cause Story in Step 3, the leader initially asked me for a straightforward two-day team training class. However, the interviews identified several unresolved conflicts that dealt with trust, respect, following through on job tasks, and work quality.

After the interviews, we decided to provide just a few hours of training at the beginning of the workshop. Then, as a team, we would apply that training to create new Work Agreements to address and resolve the team's work ethic conflicts.

Here's how I used the Punch List in that situation. In the 2<sup>nd</sup> Draft Plan, I presented to the leader, I included "Work Ethic" as an issue/topic.

The first topic under “Work Ethic” read:

1. Is it okay to have an unresolved conflict if it affects individual and/or team productivity? If not, what is our Work Agreement with respect to solving conflicts and/or giving performance feedback?

<b>B. Work Ethic</b>	<p>This topic is about team interaction style, conflict resolution, work quality, productivity, interdependency, etc. that increases trust, respect, and confidence in one another.</p> <ol style="list-style-type: none"> <li>1. Is it okay to have an unresolved conflict if it affects individual and/or team productivity? If not, what is our Work Agreement with respect to solving conflicts and/or giving performance feedback? For instance, ...</li> <li>2. If someone doesn't do what they said they'd do (or are assigned to do), how do we call them out in a supportive way? How do we hold them accountable?</li> <li>3. If a teammate doesn't perform like you believe they should, what should you do? For example, if you believe a particular responsibility should be performed by another person, is it okay to call it out?</li> <li>4. Trust and respect: If you do not trust another person and it affects your performance, what should you do?</li> <li>5. If we feel we are not getting acknowledged/recognized for the work we're doing, what should we do?</li> </ol>
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Do you see the impact of posing the topic as a question?

By asking, “*Is it okay?*” can you imagine how teammates will answer?

Will they tell you their unresolved conflict is acceptable? Will they try to convince you they should keep their disputes?

Of course not.

That’s why posing workshop topics as questions is an effective way of getting everyone on board and in alignment without ever explicitly asking them.

By writing your Punch List items as questions, you encourage your team to accept responsibility and create accountability for each item on the list. When teammates agree there is an issue and declare they want to make a Work Agreement to solve the problem, they accept accountability.

Another benefit of this approach is that neither the team leader nor the facilitator has to say to teammates, “We need to get your buy-in.” You never want to use that term because it implies it’s your agenda and not theirs.

### **Discover Other Team Building Workshop Outcomes**

As you write and edit your Punch List, you will naturally begin to identify other potential workshop outcomes.

In the Root Cause Story in Step 3, I started the interviews with two outcomes. After the interviews, I proposed two additional outcomes, which were added to my Punch List, and ultimately, I presented them in the 2<sup>nd</sup> Draft Plan.

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In the next step, you’ll use your Punch List to create and present your 2<sup>nd</sup> Draft Plan.