PM World Journal (ISSN: 2330-4480)
Vol. X, Issue IV – April 2021
www.pmworldjournal.com

Adaptive Teams: Rethinking the "Box"
by Ryan Daugherty & Dave Ellison
Second Edition[1]

Adaptive Teams: Rethinking the "Box" [1, 2]

By Ryan Daugherty and Dave Ellison

Overview:

Teams plan and deliver their "products" in an environment of nearly continuous change. The physical environment is becoming less predictable; technological change accelerates each year; legal, regulatory, and political changes seem to occur almost daily; and economic volatility demands increasingly savvy management of resources. The risks are high and require responses that are both timely and effective.

Creating – *and developing consensus around* – innovative solutions that work in real-world situations and that can be adapted to future conditions is a tough assignment. Doing so while enhancing team capabilities for efficient and effective delivery and the value of the products they deliver is a tall order and a challenge for leading teams to become more **"adaptive"** in their thinking and their approaches to problem-solving.

About the "Box"…

Lately, we've come to refer to conditions that restrict or obstruct new ideas as the **"box"** and that fresh, innovative ideas only come from "thinking outside" of it or from "disruption" of the processes inside. The "box" has become a metaphor for "old thinking": opaque, difficult to change, and an impediment to progress.

While the idea of the box is simple and easy to grasp, the underlying problems are not. The "box" represents the "culture" within which teams plan and deliver their products. The culture, in turn, is made up of a host of different influences – *internal and external* – which can impede team flexibility and affect the generation and capture of innovative ideas. Just identifying and cataloging all the factors that restrict team adaptability is a daunting task, but maybe we can take a different approach. The solution might simply lie in the way we look at the box.
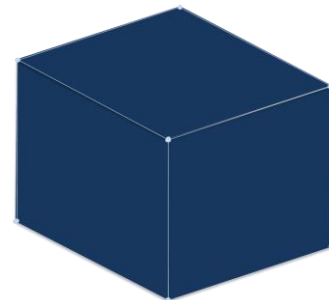

Figure 1 – The "Box"

Instead of thinking about the "box" as a roadblock to innovation and adaptability, maybe we can use it to create a framework for focused innovation, disciplined response to changing conditions, and a sound foundation for continuous improvement.

---

[1] Editor's note: Second Editions are previously published papers that have continued relevance in today's project management world, or which were originally published in conference proceedings or in a language other than English. Original publication acknowledged; authors retain copyright. This paper was originally published in Project Management Times in May 2020. It is republished here with the author's permission.

[2] How to cite this paper: Daugherty, R. and Ellison, D. (2020). Adaptive Teams: Rethinking the "Box"; Originally published in *Project Management Times*, May 2020; republished in the *PM World Journal*, Vol. X, Issue IV, April 2021.

PM World Journal (ISSN: 2330-4480)
Vol. X, Issue IV – April 2021
www.pmworldjournal.com

Adaptive Teams: Rethinking the "Box"
by Ryan Daugherty & Dave Ellison
Second Edition[1]

Three "Dimensions":

Adaptive Teams, teams that effectively adapt to changing conditions, bear the traits of all successful teams. However, certain attributes, at which they are particularly adept, stand out. We have grouped these into three major categories or **dimensions**.

Teams that have established and "balanced" these three dimensions possess the "necessities" for developing and maintaining an effective Adaptive Team culture. Likewise, the absence *or significant imbalance* of these dimensions diminishes that ability.

Figure 2 - The "Box" Redefined
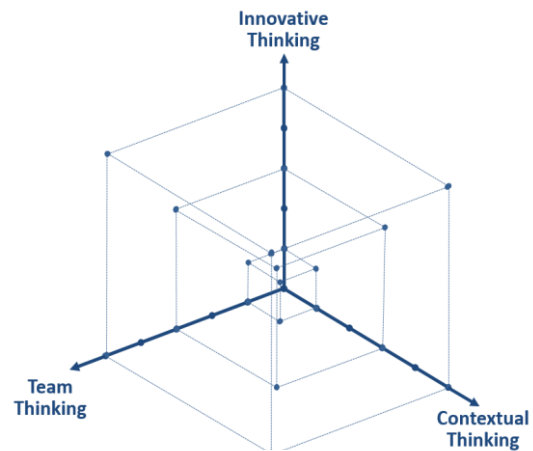
Team Thinking: Adaptive Teams recognize that high trust, commitment, empathy, and open collaboration are vital to the success of any team undertaking. But, they also acknowledge the importance of being a "learning team," and that means much more than working well together and sharing information. They recognize that it's about "cohesion" not "conformance" and that maintaining a learning environment demands an appreciation of the views, styles, capabilities, and needs of each team member and an ability to both respect and challenge ideas in ways that lead to their greater value.

Contextual Thinking: Adaptive Teams use an "objective context" for team ideation, shared understanding, and action planning. Generally, that context is a model of the system – *the sequence of processes and interfaces* – that produces the intended product, i.e., the team's mission or "value stream". Facts, evidence, issues, problems, and solutions are expressed, understood, planned, and implemented using that neutral "canvas" first, then in the context of individual components, organizations, and the like. Using a neutral model as the primary point of focus requires participants to shed personal and organizational bias to present and assess value in terms of the whole system. It can be an effective deterrent to the development of "silos" and "fences".

Innovative Thinking: Adaptive Teams collectively represent a balance of styles and methods of thinking – convergent, divergent, and integrative. Those styles and that balance can yield imaginative perspectives and the ability to distill free-ranging ideas into practical actions applicable to "real" situations, the realities of risk, and the limitations of resources.

Not all ideas and innovations are "home-grown", Adaptive Teams have an innate curiosity, peripheral vision, and connectedness with other fields, systems, and organizations that can yield useful ideas that can be "repurposed" into opportunities for improvement.
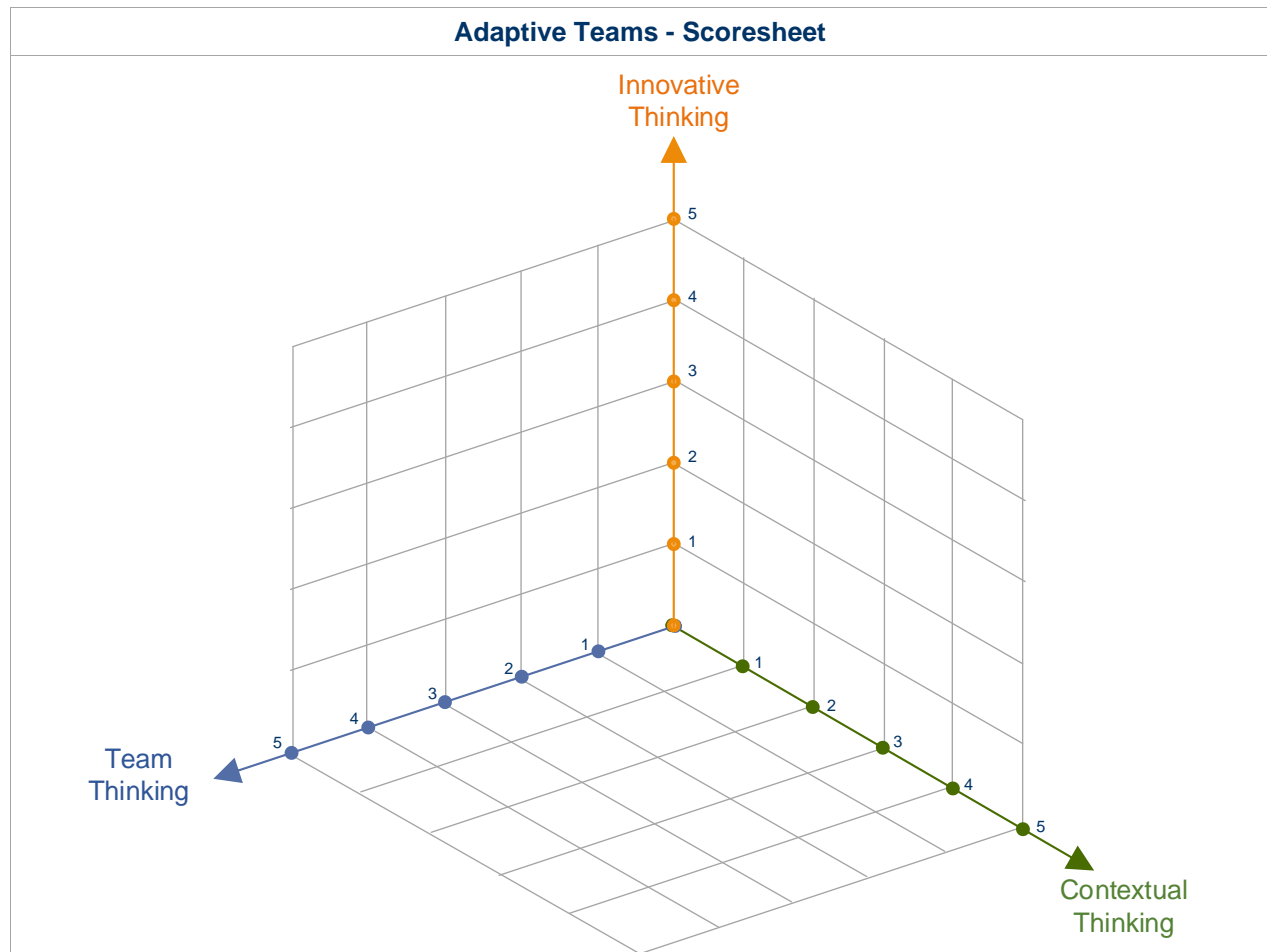
The *constant pursuit* of innovative ideas is the fuel for energy, growth, and improvement - it's not something to "start" once you're facing a challenge.

Understanding the Current Situation – The "Box" Score

Developing an **Adaptive Team Environment** requires a sound understanding of a team's current strengths and weaknesses and how they align with the attributes and characteristics of value to the enterprise, the team, and its mission. This requires a "qualitative" dialogue but one that can be approached a "quantitative" way.

PM World Journal (ISSN: 2330-4480)
Vol. X, Issue IV – April 2021
www.pmworldjournal.com

Adaptive Teams: Rethinking the "Box"
by Ryan Daugherty & Dave Ellison
Second Edition[1]

The **Quick Assessment Guide** is a simple way to get started. Evaluate the three dimensions and your teams' "Box Score" by using this simple five (5) point rating system where 1 = Restrictive and 5 = Benchmark.

	Score	Team Thinking	Contextual Thinking	Innovative Thinking
**Adaptive Teams – Quick Assessment Guide**			
5	Benchmark	The real joy in Team Thinking exists through dialogue and high trust levels between all participants. Effortless and completely open communications are achieved with a mastery of personal styles, personal inquiry, and advocacy.	The Team has fully integrated Contextual Thinking into day-to-day performance. While maintaining connections to individual areas of expertise and organizational alliances, members are dedicated to the sustainable success of the whole system.	The Team is continuously inspecting every aspect of performance – large and small - for opportunities to improve. Team members have connections in other fields and the "peripheral vision" to see the applicability of breakthrough innovations achieved by others.
4		Team members have developed a high level of trust and mastery of dialogue through continuous improvement of trust levels, personal inquiry, advocacy, and compassion. Appreciation for and flexing of individual styles supports open communications.	Team members have developed and use a system model as a tool for continuous improvement. The model is used to search for, document, and implement improvements for detailed problem solving and for decision-making.	The Team has developed Innovative Thinking as "standard practice" and combines analytical and critical thinking with a willingness to depart from established norms. The Team thinks beyond constraints and seeks out multiple solutions to improve performance.
3	Sustainable	Team members are fully committed to team success and have developed a level of trust that results in open, respectful, and productive dialogue. Personal styles are recognized, and team members work collaboratively on issues and solutions.	Team members share a sound understanding of the whole system. Implications of alternative solutions are studied in the context of the entire system to find and validate the most beneficial solutions.	The practice of Innovative Thinking is established and supported by team member attitudes and competencies. The Team has a sense of curiosity about ways to improve performance and appreciates innovative but practical ideas.
2		A team charter is in place. Team purpose, roles, and responsibilities are identified. Advancement of team trust has started. Personal styles have been identified and coupled with a team communication plan.	Team members have basic knowledge of the whole system and the role of their area in it. But, there is a tendency to see and support perspectives in the context of their area of interest or expertise without connecting them to the whole system.	There is a growing awareness of the need for innovative solutions, but creative thinking is often met with suspicion. There is little appetite for exploring solutions as a team. The focus is on "who is right" vs. "what is right".
1	Restrictive	A team charter is in place. The working environment is absent of trust, advocacy, and inquiry. Communications are guarded. Hostile behaviors occur along with the blaming of others and a general lack of respect for other team members.	Recognition of context - the whole system including inputs, process, outputs, and interfaces - is absent. Team members focus on independent, localized, very narrow problems and concerns. Think silos and fences.	Recognition of Innovative Thinking is absent. There is little or no appreciation for the diversity of thought. There is little or no incentive or motivation to be creative. Think, "It's always been good enough; don't rock the boat!"

PM World Journal (ISSN: 2330-4480)
Vol. X, Issue IV – April 2021
www.pmworldjournal.com

Adaptive Teams: Rethinking the "Box"
by Ryan Daugherty & Dave Ellison
Second Edition[1]

The Quick Assessment Guide and Scoresheet can be used individually or in open dialogue to develop a consensus view. Either way, it enhances team familiarity with the concepts involved, helps team members to become more confident in discussing team strengths and weaknesses and ways to improve their adaptability, and can serve as a segue to the more comprehensive evaluation and planning.

Bear in mind that the "scoring" is relative to team interpretation of the descriptions provided and that the actual "Box Score" only indicates the Teams' opinion of their current capabilities.

The real value here is in the qualitative dialogue: the discussions, considerations, and agreements that went into the "scoring".

A More Detailed Assessment

The following more granular approach provides a richer understanding of specific areas in need of improvement and a robust basis for planning improvements. The table (below) describes nine (9) attributes and twenty-seven (27) characteristics of Adaptive Teams. While the model may not fit every situation or need, it provides a starting point" for understanding what is important to the team and the current environment.

PM World Journal (ISSN: 2330-4480)
Vol. X, Issue IV – April 2021
www.pmworldjournal.com

Adaptive Teams: Rethinking the "Box"
by Ryan Daugherty & Dave Ellison
Second Edition[1]

Dimensions	Attributes	Characteristics	Descriptions
		Adaptive Teams - Detailed Assessment	
Team Thinking	**Alignment**	Trust	Participants understand that trust is the highest form of human motivation and are committed to build and improve trust, both individually and as a team.
		Responsibility	Each participant has the commitment and capability to perform the responsibilities they assume for the team and the organizations they represent and the authority to support it.
		Determination (Grit)	Participants recognize that the success of the team depends on the determination of each of the participants and their power to keep commitments to themselves and the Team.
	Empathy	Compassion	Participants see and understand the interrelationships of others and pursue awareness and more in-depth understanding of the needs and requirements of all participants
		Inquiry	Participants engage in constructive face-to-face interactions in dealing with complex and controversial matters and willingly engage in follow-on dialogue, continuing and enlarging on thoughts and ideas
		Commitment	Participants are genuinely committed to the team and its shared vision of success - which is always to something larger than themselves and their measures of success.
	Collaboration	Dialogue	Participants aware that team learning starts with interpersonal and inter-team dialogue and the suspension of individual assumptions and an environment of genuine "thinking together."
		Advocacy	Participants practice balance between inquiry (questioning) and advocacy (supporting) in a way that validates the ideas and solutions and fosters team learning
		Appreciation (Styles)	Participants understand and apply their styles and make an effort to understand and appreciate the styles of other participants, thereby expanding their levels of communication.
Contextual Thinking	**Definition**	Components	All relevant components of the whole system been identified and considered for their role and implications.
		Interconnections	All participants understand the way system components work together and the criticality of component interfaces - external and internal.
		Functions	All participants understand the functions - inputs, process & products - of the system and the relevant components and their criticality to the function of the whole system.
	Environment	Technical	All of the technical aspects – operating parameters - of the system are understood and represented with appropriate expertise.
		Physical	The physical environment - internal and external - characteristics are known, and appropriate information is available to the team.
		Business, Regulatory & Governance	All of the applicable business, regulatory and governance parameters, requirements and limitations are understood and appropriately represented
	Use	Problems & Issues	All issues, problems, facts, and evidence are defined, portrayed, and understood in the context of the whole system first – then in the context of components, organizations, etc.
		Alternatives & Solutions	All alternatives and solutions are portrayed and understood in the context of the whole system first – then in the context of components, organizations, etc.
		Evaluation & Planning	All alternatives and solutions are evaluated, selected, and planned in the context of the whole system before evaluating the impact on individual components, organizations, etc.
Innovative Thinking	**Critical Thinking (Convergent)**	Analytical Skills	Participants have the appropriate analytical skills: the ability to identify and share "what we know", "how we know it", and "what it means" and can explain their findings.
		Objectivity	Participants analyze and evaluate the problems, issues, and solutions without preconceived opinions or "organizational" agendas.
		Logic	Participants are capable of logically connecting conditions, issues, causes, effects, problems, and solutions to collectively understand needs and requirements.
	Creative Thinking (Divergent)	Vision	Participants share a coherent vision of the system and an understanding of the problems and issues they're trying to solve.
		Curiosity/ Imagination	Participants have the bandwidth and willingness to apply lateral thinking and delve into alternative approaches, whole system solutions, and departures from established methods.
		Fluidity/ Flexibility	Participants think beyond constraints and impediments and develop ways to work around or remove them. Think water flowing over, under, and around rocks.
	Integrative Thinking (Practicality)	Projection	Participants understand the implications of potential solutions on the whole system, its operating environment, and the people who must live by them.
		Planning	Participants convert thoughts and ideas into actionable tasks and logical and efficient processes and tools.
		Clarity	Participants clearly communicate the requirements and action plans to others internally and externally.

PM World Journal (ISSN: 2330-4480)
Vol. X, Issue IV – April 2021
www.pmworldjournal.com

Adaptive Teams: Rethinking the "Box"
by Ryan Daugherty & Dave Ellison
Second Edition[1]

The Assessment Workshop

The value of this approach is greatly enhanced by using an in-person "workshop" to arrive at a common understanding of terms, consensus agreement about team strengths and weaknesses, needs and priorities, and planning improvement actions. Participants should include the whole team as well as appropriate stakeholders.

While there is significant value in understanding strengths and weaknesses at this level of detail, there is equal or greater value in "growing" that understanding "organically" with internal resources. The team and the stakeholders understand their situation – *capabilities, capacities, needs, and constraints* – better than any external source. The efforts and interactions of the team and the stakeholders in the workshop can be a solid foundation for future work together and alignment on their vision of the "new" box and its possibilities.

Building a Better Box: It's about Balance and Continuous Learning

The "dimensions" and the skills they represent are interdependent and synergistic. *Team* thinking and *System* understanding provide the framework for creating and implementing *innovative* adaptations, methods, and solutions. The adage that a chain is only as strong as its weakest link is in play here. The Team's ability to adapt and to effect change in the system is proportional to its strengths in all three dimensions.

Adaptive teams - those that consistently produce flexible approaches and solutions have not only developed a mastery of the skills and capabilities comprising these dimensions, but they have also created a ***"balance"*** between them. Those skills and that balance are the hallmark of adaptable teams and the goal for which we should aim.
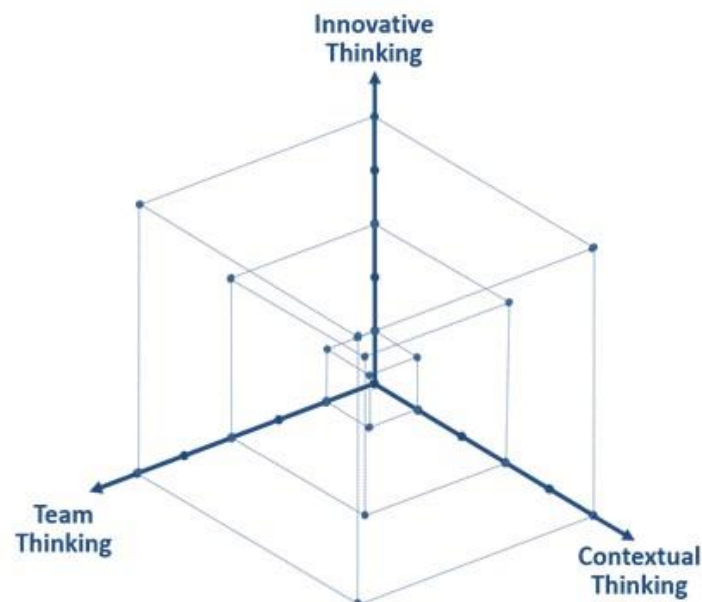

Figure 3 – The "New" Box

PM World Journal (ISSN: 2330-4480)
Vol. X, Issue IV – April 2021
www.pmworldjournal.com

Adaptive Teams: Rethinking the "Box"
by Ryan Daugherty & Dave Ellison
Second Edition[1]

Improving Your Team's Adaptability

The needs of one team will differ from every other team; no single solution will create a sustainable and adaptable team environment. But the patterns are very similar. Once the Team has developed a consensus about what it – *the Team* - thinks an Adaptive Team Environment is, how they stack up and where they should be; it's time to take the first steps toward that ideal.
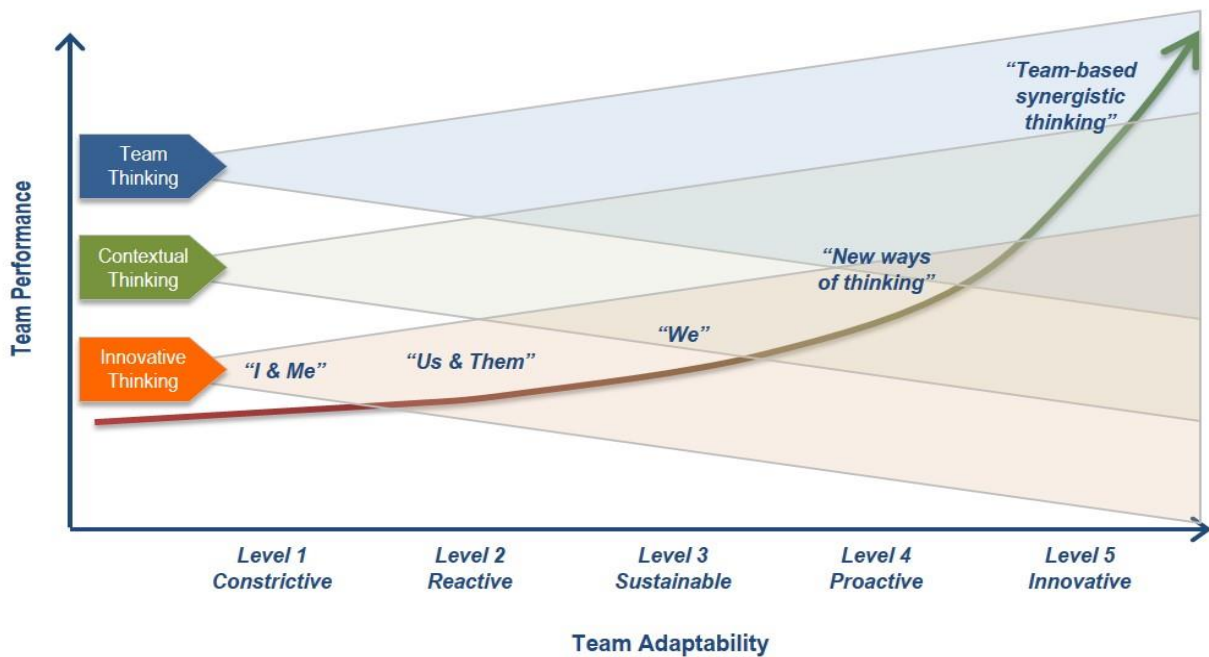

Figure 4 – Team Performance Can Increase Exponentially as Adaptability is Enhanced

Here are a few ideas for each "dimension" to help you get started:

Team Thinking: The goal of team thinking is to achieve team synergy – building on one another's capabilities, ideas, and energy – to create the foundation of an Adaptive Team Environment. Experience has shown that the best way to develop team thinking is by focusing members on the same goal, making space for team learning, creating structures for self-managing, and enabling team members to self-manage in an environment of learning and continuous improvement.

There are three sequential stages to the Team Thinking process:

- *Charter the Team* – Chartering, a critical first step in developing team thinking, is the act of guiding a team through the process of defining itself. The team documents agreements on its purpose, scope, goals, measures of success, roles, responsibilities, behaviors, authorities, and other elements essential for working together and being or becoming "adaptive". The resulting Team Charter should be kept "dynamic" by revisiting it frequently and adapting its content to accommodate changing conditions, improve performance, and to reinforce its messaging.

- *Build the Team* – The second stage of team thinking is team learning. Whether it's new skills – decision-making, planning, problem-solving, trust-building, interpersonal skills, etc. or new methods or lessons learned from actions taken – learning is essential to the adaptive team.

PM World Journal (ISSN: 2330-4480)
Vol. X, Issue IV – April 2021
www.pmworldjournal.com

Adaptive Teams: Rethinking the "Box"
by Ryan Daugherty & Dave Ellison
Second Edition[1]

Skill development and team learning are best interwoven and aligned with the team's project work. Top priority team learning areas for interpersonal skills include <u>trust-building</u> and <u>personal styles</u> because both are essential for full team collaboration

- *Sustain the Team* – The third stage of team thinking is critical if the team is to become a high-performance team. High performance means that a team can optimize the technical and behavioral facets of its work; that is, the right people are performing the right tasks in the right way at the right time. Achieving this level of performance usually requires experience, along with a commitment to continuous improvement. To achieve this level of performance, the team must develop its capabilities in three areas: diagnosis, evaluation/feedback, and corrective action. ***Revisit the "box" often!***

Contextual Thinking:

- *System Model* – To understand – *and explain* – the implications of the Team's ideas and actions and to adequately monitor the system and its operating environment, all participants should share a universal understanding of the whole system – inputs, process, components, output, and interfaces. A "model" – typically a graphic representation or "infographic" – depicting the system and its interfaces is often used for this purpose.

  *The "system model" may also be used as the framework for organizing and sharing more comprehensive system and team information - **a "knowledge hub"**- and a foundation for continuous improvement.*

- *System Context -* The ability to visualize the system provides context for universal understanding and common ground for monitoring, evaluating, analyzing, and explaining the system, its needs, issues, and solutions. The System Model should become the central point of focus for all team interactions – *internal and external*. While the team members should understand and have empathy for the roles, responsibilities, issues, and needs of others, it should do so in the context of the system first.

- *Breakdown Barriers* – Working together to devise ways of depicting the system and its operating environment provides a common ground for building team empathy and appreciation for the diversity of thinking. Using the resulting "system model" as the primary context for team interactions can be a path toward eliminating "proprietary" thinking and the "silos" that often restrict innovative thinking and cooperative action.

Innovative Thinking:

- *Diversity of Styles* – A key to innovative team thinking lies in the variety of thought and expression - *styles*. Populating the team with participants from different areas and specialties, with "different" but useful capabilities and thought processes can provide the kind of positive disruption needed to create "peripheral vision" within the team.

  Note that by "disruption" we mean "stirring the pot", not just tipping it over to see what happens.

  This requires team appreciation of the styles of thought and expression of others – "empathy". It also requires astute leadership to allow the team the freedom needed to create and still maintain a balance between imagination and practicality.

PM World Journal (ISSN: 2330-4480)
Vol. X, Issue IV – April 2021
www.pmworldjournal.com

Adaptive Teams: Rethinking the "Box"
by Ryan Daugherty & Dave Ellison
Second Edition[1]

- *Practice Improvisation* – Work with team members to create a culture of improvisation – think "MacGyver". Incentivize and reward imaginative methods for improving the system and team functions and ways to use resources. Develop positive team reaction by challenging the team to invent different approaches and solutions to hypothetical and real situations. This is also where the use of the "system model" as the context for explaining and evaluating the practicality and practicability of creative plans and actions provides a neutral basis for screening ideas.

- *Connections* – Team members should be encouraged to widen their interests and connect with other entities and systems to monitor and exchange ideas and approaches. Those systems need not be the same or even in the same sector. It is useful to look at policies and work with entities in other areas, industries, and locales, where approaches to operations and risks may have the potential for improvement.

Summary

The power of this approach is twofold. First, the approach presents a simple, "quantitative" way for the team to evaluate its current performance level in all three dimensions. Second, the resulting model, along with the understandings that went into it, is a basis for exploring ways to build a "box" that allows boundaries to expand while providing a disciplined and focused core for innovation and adaptability.

A guide to implementing this approach: **"Understanding the Adaptive Team Environment"** is available free of charge from the author. In presentation format, the guide provides additional guidance, tools, and potential actions for improving the Adaptive Team Environment.

Questions, comments and ideas for improving this approach are always welcome, please forward to the authors via email.

PM World *Journal* (ISSN: 2330-4480)
Vol. X, Issue IV – April 2021
www.pmworldjournal.com

Adaptive Teams: Rethinking the "Box"
by Ryan Daugherty & Dave Ellison
Second Edition[1]

About the Authors

Ryan Daugherty

Washington, USA

Ryan Daugherty is the designer/developer of the Process|Simple^{TM} Platform for Project/Process Knowledge Hubs. He has nearly 50 years of hands-on project delivery management experience with the Boeing Company, CH2M HILL (now Jacobs), among others. He has consulted on public and private sector projects worldwide. Ryan can be contacted at ryandaugherty@ryandaugherty.com

Dave Ellison

Colorado, USA

Dave Ellison, P.E. is the founder and owner of Synergy Connects, LLC focussed on leadership and team learning. Dave draws on his 27 years of experience as a project/program manager for CH2M HILL (now Jacobs). In 1995 he led the team that developed and implemented the company's Project Delivery System. Email: Dave_Ellison@SynergyConnects.com