GWebinars
Marketing & Advertising Industry Network
GWebinar: Team Building Skills for Marketers

Dina Shapiro, CCAS BA '89
Chief Executive Officer and Chief Learning Officer, Yorkville Consulting
Today’s Organizations: Matrixed and Complicated

So just to clarify, in the matrix you report to me for operations, the LBM for functional development and SAP for product innovation.
Marketing is a Team Sport
Importance of Being a Team Player

Most organizations have a consensus building culture

Strength in numbers

Encourages healthy risk taking

VUCA

© Yorkville Consulting. All rights reserved.
Benefits of Being a Team Player

Feel connected
Art of influence
Strong relationships and network
Collective wisdom and diversity of thought
Share best practices
Leverages each person’s strengths
Work through complicated problems together
Advance your career

Together
Everyone
Achieves
More
Today’s Learning Objectives

TEAM BUILDING SKILLS FOR MARKETERS

1. Different Personality Styles
2. Responsibility Charting
3. Collaboration vs. Cooperation
4. Conflict Resolution
5. Dialogue vs. Debate
6. Share Your POV Effectively
7. After-Action-Review
8. Key Takeaways

© Yorkville Consulting. All rights reserved.
Today’s Learning Objectives

TEAM BUILDING SKILLS FOR MARKETERS

1. Different Personality Styles
2. Responsibility Charting
3. Collaboration vs. Cooperation
4. Conflict Resolution
5. Dialogue vs. Debate
6. Share Your POV Effectively
7. After-Action-Review
8. Key Takeaways

© Yorkville Consulting. All rights reserved.
Most of the Time, We Don’t Choose Our Teams

BALLOT

1  Yes
2  Yes
3  Yes

© Yorkville Consulting. All rights reserved.
Stages of Group Development

1. Form
2. Storm
3. Norm
4. Perform

Source: Tuckman’s Stages of Group Development © Yorkville Consulting. All rights reserved.
Introverts and Extroverts

Where we get our energy from... how we recharge our brains

Introverts tend to:
• recharge by spending time alone
• lose energy from being around people for long periods of time, particularly large crowds

Extroverts tend to:
• recharge by being social
• gain energy from other people
• find their energy is drained when they spend too much time alone

© Yorkville Consulting. All rights reserved.
What is Your Tendency?

These statements generally apply to me:

I am seen as "reflective" or "reserved."
I feel comfortable being alone and like things I can do on my own.
I prefer to know just a few people well.
I sometimes spend too much time reflecting and don't move into action quickly enough.
I sometimes forget to check with the outside world to see if my ideas really fit the experience.

These statements generally apply to me:

I am seen as "outgoing" or as a "people person."
I feel comfortable in groups and like working in them.
I have a wide range of friends and know lots of people.
I sometimes jump too quickly into an activity and don't allow enough time to think it over.
Before I start a project, I sometimes forget to stop and get clear on what I want to do and why.

Source: Myers Briggs
© Yorkville Consulting. All rights reserved.
Tips to Work with Introverts

1. **RESPECT** their need for privacy

2. Let them **OBSERVE FIRST** in new situations

3. Give them time to **THINK**

4. Allow them to finish their thought **WITHOUT INTERRUPTING**

5. Give them advance **NOTICE** of changes

6. Provide feedback **1:1**

7. Let them find **COLLEAGUES** with similar abilities
Tips to Work with Extroverts

1. **RESPECT**
   - their independence

2. **COMPLEMENT THEM**
   - in the company of others

3. **ACCEPT and ENCOURAGE**
   - their enthusiasm

4. **Allow them to EXPLORE**
   - ...and talk things out

5. **Let them DIVE RIGHT IN**

6. **Offer them OPTIONS**

7. **Let them SHINE**

Sources: Buffer Social Blog; Inc. Extroverts vs. Introverts © Yorkville Consulting. All rights reserved.
Today’s Learning Objectives

TEAM BUILDING SKILLS FOR MARKETERS

1. Different Personality Styles
2. Responsibility Charting
3. Collaboration vs. Cooperation
4. Conflict Resolution
5. Dialogue vs. Debate
6. Share Your POV Effectively
7. After-Action-Review
8. Key Takeaways

© Yorkville Consulting. All rights reserved.
What is Responsibility Charting?

- Identifies process ambiguities
- Highlights different perspectives
- Resolves these ambiguities and differences through a cross-functional collaborative effort
Benefits of Responsibility Charting
Engages Across Levels and Disciplines
Accountability Placed With Right Person

No one person is accountable for everything!
Focused and systematic dialogue
Defines Relationships Across Disciplines

Communications and actions required

Roles by discipline (de-personalized)

Source: PMI

© Yorkville Consulting. All rights reserved.
Responsibility Charting reconciles conceptions and expectations, so behavior becomes more predictable and productive.

Source: PMI
Responsibility Charting
How to Kick Start the Process
Responsibility Charting

RACI Definitions

- **Responsible**
  - "The Doer"
  - Who completes the task
  - Can be shared

- **Accountable**
  - "The Buck Stops Here"
  - Ultimately answerable for activity or decision
  - Yes-no-veto authority

- **Consult**
  - "In the Loop"
  - Subject matter expert consulted prior to final decision
  - Two-way communication

- **Inform**
  - "Keep in the Picture"
  - Informed after decision or action taken
  - One-way communication

Sources: PMI; Wikipedia. Note: RACI is one of multiple approaches. © Yorkville Consulting. All rights reserved.
Responsibility Charting

Five Step Process

1. Identify the work process
   - Established process
   - 10-25 steps

2. Determine decisions and activities
   - Avoid generic, obvious or ambiguous steps
   - Begin each step with a good action verb

3. List each discipline for each step
   - Can be individual or group
   - Across disciplines
   - Depersonalize

4. Develop RACI chart
   - Start with “R’s”, then “A”, then complete “C’s” and “I’s”
   - Use facilitator for large or complex projects

5. Obtain feedback and buy-in
   - Distribute chart to all on chart who were not present in development
   - Apply feedback

Source: PMI

© Yorkville Consulting. All rights reserved.
Today’s Learning Objectives

1. Different Personality Styles
2. Responsibility Charting
3. Collaboration vs. Cooperation
4. Conflict Resolution
5. Dialogue vs. Debate
6. Share Your POV Effectively
7. After-Action-Review
8. Key Takeaways

TEAM BUILDING SKILLS FOR MARKETERS
Today’s Complex Business Market

Collaboration is Necessary to Compete

- Easier said than done!
- Collaboration is **NOT** the dominant personality saying “do it my way”
- Good starting points include *genuine willingness* to:
  - Work together
  - Share information
  - Cooperate

True collaboration is all of that and more...

**requires tough decisions and trade-offs**
### Cooperation vs. Collaboration

<table>
<thead>
<tr>
<th>Cooperation is...</th>
<th>Collaboration is...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Easier</td>
<td>Harder, but worth it!</td>
</tr>
<tr>
<td>Exchange information and resources in support of each individual's goals</td>
<td>Collective team effort to create something new in support of a shared goal</td>
</tr>
<tr>
<td>Each individual responsible to solve a portion of the problem</td>
<td>Coordinated and synchronous group effort to construct a shared solution</td>
</tr>
<tr>
<td>Each individual controls and makes decisions in their territory</td>
<td>Each individual gives up some control...knows when to “fall on a sword” vs. back down</td>
</tr>
<tr>
<td>Uses expertise by silo</td>
<td>Requires respect of each subject matter expert, trust and openness to diversity of thought</td>
</tr>
<tr>
<td>Willing to share information, “if you help me, I’ll help you”</td>
<td>Align resources with company goals to synchronize strategies and performance measures</td>
</tr>
</tbody>
</table>

Sources: Harvard Business Review, Huffington Post © Yorkville Consulting. All rights reserved.
Benefits of Collaboration

Engages and creates a sense of community amongst team members

Multiple perspectives to validate ideas and solve problems

Each individual learns and retains more knowledge

Positively affects the outcome of a project

Sources: Bright Hub; Ingram; elcom

© Yorkville Consulting. All rights reserved.
Collaboration Best Practices

Don’t rely 100% on emails – communicate live whenever possible
Collaboration Best Practices

Don’t rely 100% on emails – communicate live whenever possible

Use responsibility charting
Collaboration Best Practices

Don’t rely 100% on emails – communicate live whenever possible

Use responsibility charting

Ask questions to clarify any unclear or inconsistent direction from leadership
Collaboration Best Practices

- Don’t rely 100% on emails – communicate live whenever possible
- Use responsibility charting
- Ask questions to clarify any unclear or inconsistent direction from leadership
- Get to know your colleagues and their strengths
Collaboration Best Practices

- Don’t rely 100% on emails – communicate live whenever possible
- Use responsibility charting
- Ask questions to clarify any unclear or inconsistent direction from leadership
- Get to know your colleagues and their strengths
- Be confident about your position in the organization and your contributions
Collaboration Best Practices

- Don’t rely 100% on emails – communicate live whenever possible
- Use responsibility charting
- Ask questions to clarify any unclear or inconsistent direction from leadership
- Get to know your colleagues and their strengths
- Be confident about your position in the organization and your contributions
- Give everyone on the team equal “floor time” - make sure each meeting has a facilitator
Collaboration Best Practices

- Don’t rely 100% on emails – communicate live whenever possible
- Use responsibility charting
- Ask questions to clarify any unclear or inconsistent direction from leadership
- Get to know your colleagues and their strengths
- Be confident about your position in the organization and your contributions
- Give everyone on the team equal “floor time” - make sure each meeting has a facilitator
- Embrace change
# Collaboration Process Framework

<table>
<thead>
<tr>
<th>Steps</th>
<th>Considerations</th>
</tr>
</thead>
<tbody>
<tr>
<td>#1 Kick-off</td>
<td>• Map out high level process and responsibility charting</td>
</tr>
<tr>
<td></td>
<td>• Determine timing, and budget if required</td>
</tr>
<tr>
<td></td>
<td>• Obtain executive sponsor</td>
</tr>
<tr>
<td>#2 Convene a working session</td>
<td>• Include all required collaborators across disciplines</td>
</tr>
<tr>
<td></td>
<td>• Review, revise and commit to collaboration contract</td>
</tr>
<tr>
<td>#3 Set objectives</td>
<td>• Group level (no one individual discipline can achieve)</td>
</tr>
<tr>
<td></td>
<td>• Make cross-discipline team accountable for performance</td>
</tr>
<tr>
<td>#4 Simplify</td>
<td>• Review high level process to balance between relevant details and simplified steps - go for speed, agility &amp; efficiency!</td>
</tr>
<tr>
<td></td>
<td>• Clarify job description and discipline capability definitions</td>
</tr>
<tr>
<td>#5 Behavioral changes</td>
<td>• Stay laser-focused on collaboration</td>
</tr>
<tr>
<td></td>
<td>• Invest in capabilities to sustain reform</td>
</tr>
</tbody>
</table>

Source: Harvard Business Review; McKinsey

© Yorkville Consulting. All rights reserved.
Today’s Learning Objectives

1. Different Personality Styles
2. Responsibility Charting
3. Collaboration vs. Cooperation
4. Conflict Resolution
5. Dialogue vs. Debate
6. Share Your POV Effectively
7. After-Action-Review
8. Key Takeaways

© Yorkville Consulting. All rights reserved.
Common Reasons for Conflict

Different goals or ideas
Common Reasons for Conflict

- Different goals or ideas
- Not listening
Common Reasons for Conflict

- Different goals or ideas
- Not listening
- Responding to ideas or questions in an unproductive way
**Common Reasons for Conflict**

- Different goals or ideas
- Not listening
- Responding to ideas or questions in an unproductive way
- Inadequate information
Common Reasons for Conflict

- Different goals or ideas
- Not listening
- Responding to ideas or questions in an unproductive way
- Inadequate information
- Different personality styles
Common Reasons for Conflict

- Different goals or ideas
- Not listening
- Responding to ideas or questions in an unproductive way
- Inadequate information
- Different personality styles
- Fear of change
Common Reasons for Conflict

- Different goals or ideas
- Not listening
- Responding to ideas or questions in an unproductive way
- Inadequate information
- Different personality styles
- Fear of change
- Power struggles
Common Reasons for Conflict

- Different goals or ideas
- Not listening
- Responding to ideas or questions in an unproductive way
- Inadequate information
- Different personality styles
- Fear of change
- Power struggles
- Competition for budgets / resources

Source: HR Council; Chron; LiveStrong

© Yorkville Consulting. All rights reserved.
Common Reasons for Conflict

- Different goals or ideas
- Not listening
- Responding to ideas or questions in an unproductive way
- Inadequate information
- Different personality styles
- Fear of change
- Power struggles
- Competition for budgets / resources
- Lack of responsibility charting
Common Reasons for Conflict

- Different goals or ideas
- Not listening
- Responding to ideas or questions in an unproductive way
- Inadequate information
- Different personality styles
- Fear of change
- Power struggles
- Competition for budgets / resources
- Lack of responsibility charting
- Previous unresolved conflicts that feed new conflicts
Common Reasons for Conflict

- Different goals or ideas
- Not listening
- Responding to ideas or questions in an unproductive way
- Inadequate information
- Different personality styles
- Fear of change
- Power struggles
- Competition for budgets / resources
- Lack of responsibility charting
- Previous unresolved conflicts that feed new conflicts
- “You’re not doing what I want you to do!”

Source: HR Council; Chron; LiveStrong
You’re Not Alone!

- 85% of employees experience conflict
- 2.8 hours/week dealing with conflict
- $359 billion in hours dedicated to employee conflict
- Conflict morphs into personal attack (73%)
- Avoiding conflict results in sickness or absence from work (75%)

Source: CPP Global Human Capital Report
© Yorkville Consulting. All rights reserved.
Destructive vs. Constructive Conflict
# Destructive vs. Constructive Conflict

<table>
<thead>
<tr>
<th>Definition</th>
<th>Destructive Conflict</th>
<th>Constructive Conflict</th>
</tr>
</thead>
<tbody>
<tr>
<td>Disagreement leads to <strong>negative</strong> outcomes, creating <strong>frustration</strong> and <strong>antagonism</strong></td>
<td>Disagreement resolved in a <strong>positive</strong> manner that <strong>benefits</strong> both parties</td>
<td></td>
</tr>
</tbody>
</table>
# Destructive vs. Constructive Conflict

<table>
<thead>
<tr>
<th></th>
<th>DESTRUCTIVE CONFLICT</th>
<th>CONSTRUCTIVE CONFLICT</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Definition</strong></td>
<td>Disagreement leads to <strong>negative</strong> outcomes, creating <strong>frustration</strong> and <strong>antagonism</strong></td>
<td>Disagreement resolved in a <strong>positive</strong> manner that <strong>benefits</strong> both parties</td>
</tr>
<tr>
<td><strong>Effect on the</strong></td>
<td><strong>Harms</strong> relationships</td>
<td><strong>Strengthens</strong> relationships</td>
</tr>
<tr>
<td>relationship</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: differencebetween.com  
© Yorkville Consulting. All rights reserved.
<table>
<thead>
<tr>
<th></th>
<th>Destructive Conflict</th>
<th>Constructive Conflict</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Definition</strong></td>
<td>Disagreement leads to <strong>negative</strong> outcomes, creating <strong>frustration</strong></td>
<td>Disagreement resolved in a <strong>positive</strong> manner that <strong>benefits</strong> both parties</td>
</tr>
<tr>
<td></td>
<td>and <strong>antagonism</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Effect on the</strong></td>
<td><strong>Harms</strong> relationships</td>
<td><strong>Strengthens</strong> relationships</td>
</tr>
<tr>
<td><strong>relationship</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Outcome</strong></td>
<td><strong>Neither</strong> party benefits</td>
<td><strong>Win-win</strong> situation, both parties benefit</td>
</tr>
</tbody>
</table>
### Destructive vs. Constructive Conflict

<table>
<thead>
<tr>
<th></th>
<th>DESTRUCTIVE CONFLICT</th>
<th>CONSTRUCTIVE CONFLICT</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Definition</strong></td>
<td>Disagreement leads to negative outcomes, creating frustration and antagonism</td>
<td>Disagreement resolved in a positive manner that benefits both parties</td>
</tr>
<tr>
<td><strong>Effect on the relationship</strong></td>
<td>Harms relationships</td>
<td>Strengthens relationships</td>
</tr>
<tr>
<td><strong>Outcome</strong></td>
<td>Neither party benefits</td>
<td>Win-win situation, both parties benefit</td>
</tr>
<tr>
<td><strong>Communication</strong></td>
<td>None or unproductive</td>
<td>Honest and open</td>
</tr>
</tbody>
</table>

---

Source: differencebetween.com  
© Yorkville Consulting. All rights reserved.
# Destructive vs. Constructive Conflict

<table>
<thead>
<tr>
<th></th>
<th><strong>DESTRUCTIVE CONFLICT</strong></th>
<th><strong>CONSTRUCTIVE CONFLICT</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Definition</strong></td>
<td>Disagreement leads to <strong>negative</strong> outcomes, creating <strong>frustration</strong> and <strong>antagonism</strong></td>
<td>Disagreement resolved in a <strong>positive</strong> manner that <strong>benefits</strong> both parties</td>
</tr>
<tr>
<td><strong>Effect on the</strong></td>
<td><strong>Harms</strong> relationships</td>
<td><strong>Strengthens</strong> relationships</td>
</tr>
<tr>
<td><strong>relationship</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Outcome</strong></td>
<td><strong>Neither</strong> party benefits</td>
<td><strong>Win-win</strong> situation, both parties benefit</td>
</tr>
<tr>
<td><strong>Communication</strong></td>
<td><strong>None</strong> or unproductive</td>
<td><strong>Honest</strong> and open</td>
</tr>
<tr>
<td><strong>Performance</strong></td>
<td><strong>Reduces</strong> performance</td>
<td><strong>Improves</strong> performance</td>
</tr>
</tbody>
</table>

© Yorkville Consulting. All rights reserved.
## Destructive vs. Constructive Conflict

<table>
<thead>
<tr>
<th></th>
<th><strong>DESTRUCTIVE CONFLICT</strong></th>
<th><strong>CONSTRUCTIVE CONFLICT</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Definition</strong></td>
<td>Disagreement leads to <strong>negative</strong> outcomes, creating <strong>frustration</strong> and <strong>antagonism</strong></td>
<td>Disagreement resolved in a <strong>positive</strong> manner that <strong>benefits</strong> both parties</td>
</tr>
<tr>
<td><strong>Effect on the relationship</strong></td>
<td><strong>Harms</strong> relationships</td>
<td><strong>Strengthens</strong> relationships</td>
</tr>
<tr>
<td><strong>Outcome</strong></td>
<td><strong>Neither</strong> party benefits</td>
<td><strong>Win-win</strong> situation, both parties benefit</td>
</tr>
<tr>
<td><strong>Communication</strong></td>
<td><strong>None</strong> or unproductive</td>
<td><strong>Honest</strong> and open</td>
</tr>
<tr>
<td><strong>Performance</strong></td>
<td><strong>Reduces</strong> performance</td>
<td><strong>Improves</strong> performance</td>
</tr>
<tr>
<td><strong>Action of parties</strong></td>
<td><strong>Cannot see</strong> that both parties must be involved</td>
<td><strong>Both parties</strong> involved to <strong>resolve</strong> issue</td>
</tr>
</tbody>
</table>

Source: differencebetween.com  
© Yorkville Consulting. All rights reserved.
# Some Conflict Resolution Styles

<table>
<thead>
<tr>
<th>Style</th>
<th>Description</th>
<th>Pros</th>
<th>Cons</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>COMPETING</strong></td>
<td>“My way or the highway”</td>
<td>Decisive, assertive, personal needs met</td>
<td>Can damage relationships, shut others down</td>
</tr>
<tr>
<td><strong>COMPROMISE</strong></td>
<td>“Let’s make a deal”</td>
<td>Fixes things quickly, finds temporary settlements to complex issues</td>
<td>Can play games, bypasses longer term solutions</td>
</tr>
<tr>
<td><strong>AVOIDING</strong></td>
<td>“I will think about it tomorrow”</td>
<td>Don’t sweat the small stuff, delays may be useful</td>
<td>Avoidance builds up and then blows, important issues not dealt with, can take more energy to avoid than address head-on</td>
</tr>
<tr>
<td><strong>ACCOMMODATING</strong></td>
<td>“It’s okay with me, whatever you want”</td>
<td>Preserve harmonious relationships, can admit there’s a better way</td>
<td>Can lead to resentment by unmet needs, can diminish influence, martyr stance</td>
</tr>
</tbody>
</table>

Sources: HR Council; Thomas and Kilman
Recommended Conflict Resolution Style

**COLLABORATE**

“Multiple heads are better than one”

**Pros**

Finds the best solution for all, which leads to:

- Higher commitment
- Higher creativity in problem solving
- Team building

**Cons**

- ??

Sources: HR Council; Thomas and Kilman © Yorkville Consulting. All rights reserved.
How to Resolve Conflict

3 Step Process

1. Recognize there’s a problem that needs to be solved
2. Explore the underlying concerns
3. Create a mutually agreeable solution

Requirements
- Participants must stay collaborative
- Sit on the same side of the table
- Never flip into oppositional or hostile stances
- Check emotions at the door

Sources: Harvard Business Review; Psychology Today
© Yorkville Consulting. All rights reserved.
Example

3 Step Process

STEVE

LORRAINE
Step 1
Recognize there is a problem to solve

“Let’s take a trip someplace new, far away! I want to travel and explore.”

“Not me. That sounds awful. I love to stay at home. When I have time off from work, the last thing I want to do is travel.”
Step 2
Explore Underlying Concerns

“I was thinking of big trip because I want to do active stuff outside. At work I sit at my desk all day. I want to get take hikes and do fun and invigorating stuff.”

“I understand. But for me, I’d prefer one place where we can just chill out. I want to relax, slow down and recuperate.”
“So I want to be able to move around a lot, and you want to be able to relax. How about a beach resort? You can chill at the beach. I can surf and explore. We can stay in that one place rather than move around, which you would prefer.”

“Sounds perfect! It’s a deal!”
Today’s Learning Objectives

TEAM BUILDING SKILLS FOR MARKETERS

1. Different Personality Styles
2. Responsibility Charting
3. Collaboration vs. Cooperation
4. Conflict Resolution
5. Dialogue vs. Debate
6. Share Your POV Effectively
7. After-Action-Review
8. Key Takeaways

© Yorkville Consulting. All rights reserved.
Definition of Debate

Origin of debate

1250–1300; (v.) Middle English *debaten* < Old French *debatre*, equivalent to de- + *batre* to beat < Latin *battere*, earlier *battuere*; (noun) Middle English *debat* < Old French, derivative of *debatre*
Opt for Dialogue Over Debate

**Debate is...**

- **Oppositional**, with two opposing sides trying to prove each other wrong
- Listening to find flaws, spot differences and counter arguments
- Only one right answer
- Closed-minded
- Seeking closure

**Dialogue is...**

- Listening to understand and find common ground
- Enlarging and possibly changing a participant’s point-of-view
- Finding the best solution together
- Open-minded
- Seeking new options
Today’s Learning Objectives

TEAM BUILDING SKILLS FOR MARKETERS

1. Different Personality Styles
2. Responsibility Charting
3. Collaboration vs. Cooperation
4. Conflict Resolution
5. Dialogue vs. Debate
6. Share Your POV Effectively
7. After-Action-Review
8. Key Takeaways

© Yorkville Consulting. All rights reserved.
Tips to Share Your Point-of-View

Share your perspective intelligently, concisely and persuasively.

Use the art of influence.

Back up your point of view with facts.
Practice Mindfulness

Be **present**

Be **open**

Listen **non-judgmentally**

Respect **diversity of thought**
A mind is like a parachute, it doesn't work unless it's open.
- Frank Zappa
Today’s Learning Objectives

TEAM BUILDING SKILLS FOR MARKETERS

1. Different Personality Styles
2. Responsibility Charting
3. Collaboration vs. Cooperation
4. Conflict Resolution
5. Dialogue vs. Debate
6. Share Your POV Effectively
7. After-Action-Review
8. Key Takeaways

© Yorkville Consulting. All rights reserved.
After Action Review

A structured review and debriefing process to analyze:

🔍 What was expected to happen

🔍🔍 What actually occurred

👍 What went well and why

🔍🔍🔍 What can be improved and why
After Action Review

Benefits

Learn and optimize

Closure on past, focus on future

Eliminates “recreating the wheel”
After Action Review

Best Practices

- Open and honest professional discussion
- Participation by everyone on the team
- Focus on results of a specific event or project
- Identify ways to sustain what was done well
- Develop recommendations to overcome obstacles
After Action Review

Starter Template

- Team participants and responsibilities
- Project objectives
- Project summary
- What went well, why, and how to maintain this success
- What did not go well, why, what can be improved and how

- Provide a clear summary of concrete and actionable recommendations that will improve the process
- Identify tasks and topics requiring leadership attention
- Share the AAR report with your project sponsor or other appropriate leader
- De-personalize it all

© Yorkville Consulting. All rights reserved.
After Action Review (AAR)

Tips to Make it a Living Practice

1️⃣ **Schedule AARs consistently** to learn from both successes and failures

2️⃣ **Gather relevant facts and figures** related to the team’s performance

3️⃣ **Make participation mandatory** and involve all team members in the discussion, including customers, partners and suppliers

4️⃣ **Follow the “Rules of Engagement”** by sharing joint learning but keeping individual comments confidential

Source: Wharton
Today’s Learning Objectives

1. Different Personality Styles
2. Responsibility Charting
3. Collaboration vs. Cooperation
4. Conflict Resolution
5. Dialogue vs. Debate
6. Share Your POV Effectively
7. After-Action-Review
8. Key Takeaways

TEAM BUILDING SKILLS FOR MARKETERS

© Yorkville Consulting. All rights reserved.
### Key Takeaways: Team Building Skills

<table>
<thead>
<tr>
<th>Tuckman’s stages of group development: bypass “storm” as quickly possible</th>
<th>Be mindful and respectful of extroverts’ and introverts’ different communication styles and needs</th>
<th>Implement responsibility charting to clarify expectations</th>
<th>Make sure you’re collaborating, not just cooperating</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use constructive, not destructive conflict</td>
<td>Opt for dialogue, not debate</td>
<td>Be open and non-judgmental</td>
<td>Develop an after-action-review template with cross-discipline feedback and buy-in</td>
</tr>
</tbody>
</table>
## Learning Reflection

<table>
<thead>
<tr>
<th>WHAT DID I LEARN TODAY?</th>
<th>WHAT WILL I DO DIFFERENTLY?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>
THANK YOU!

- Contact me to bring this full-day workshop on-site for your team

Dina.Shapiro@YorkvilleConsulting.com
646-284-2481
https://www.linkedin.com/in/shapirodina
www.yorkvilleconsulting.com