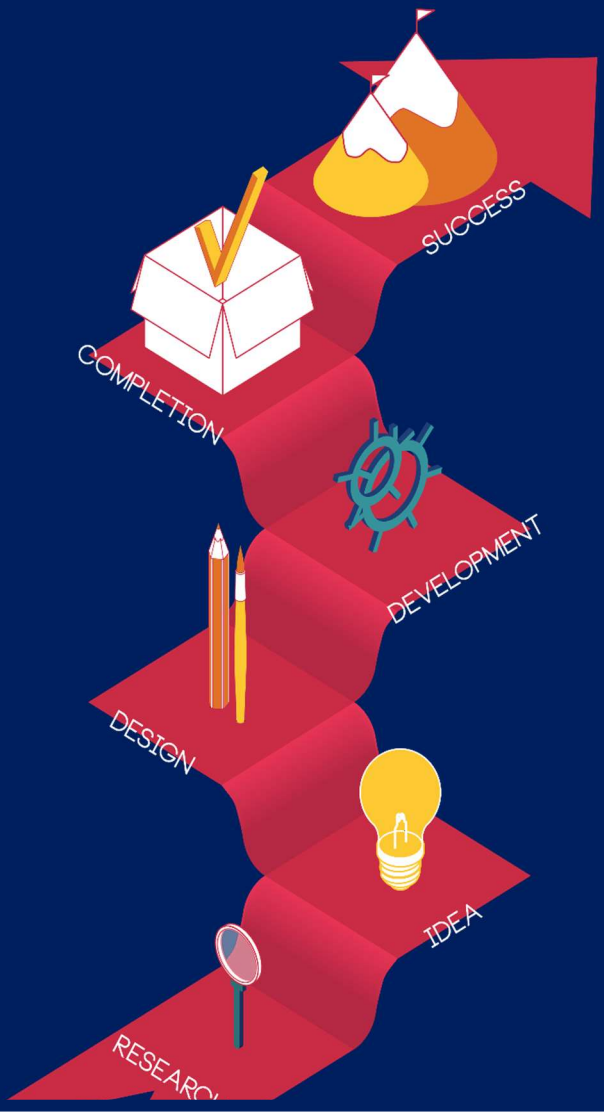

IO2 Toolset for Team Development

Team Roles Tool

-online implementation-

Institute Polytechnic of Porto

27.07.2021

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Title:	*IO2 Toolset for Team Development* *Team Roles Tool*
Project result (Intellectual Output – IO4)	*Tool to clarify team member roles*
Description	Tutorial on a symbolic-based solution to map teams' purposes, roles, and tasks.
Partner organisation	*Institute Polytechnic of Porto (P.PORTO)*
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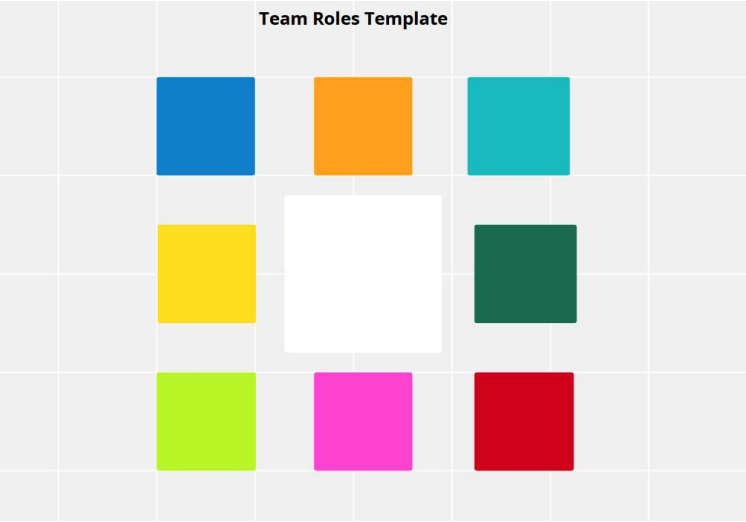
Objective of the tool and fields of application

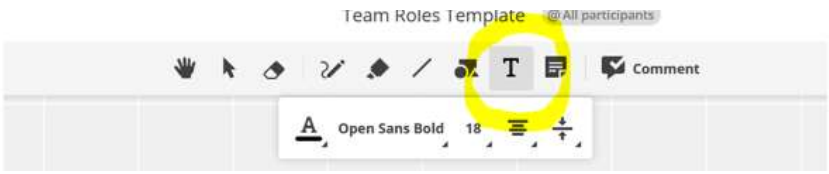
This tool has the aim of supporting teams in defining and getting awareness of their identity and performance. As a collective identity, teams need to create and develop themselves in a collaborative process. Although this process occurs naturally, it is beneficial to create specific moments to focuson “who we are” and “what do we want”. Pausing, focusing, and thinking deliberately on the team’s purpose and team members’ roles enhance awareness of oneself, of others, of the iteration between the parties and of the whole. This realisation may represent a cornerstone for teams’ success.

Online Resources

Link: Team Roles Template

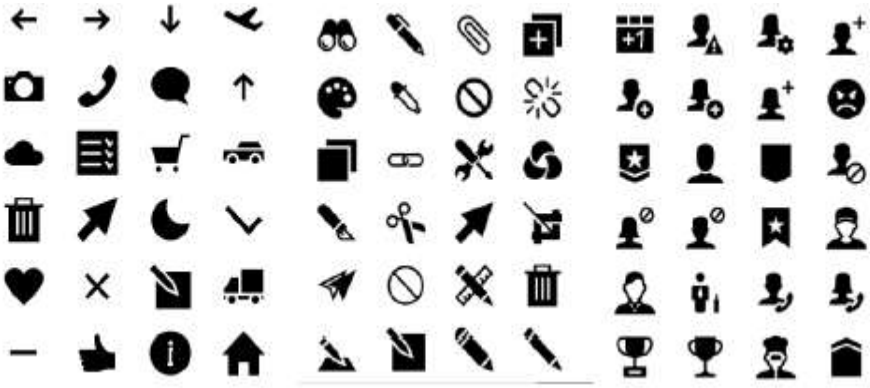


A **toolbar** with an online pen to write text



and a resource do draw lines;

A set of Symbols.



Implementation Process

This tool may be implemented with all the 8 steps. In this case, you will be working all over the team roles issues or, if you are short on time or just want to work on a particular issue, you may apply just the introductory step, the ending step and any step (or steps) in between in which you are interested.

Step overview

1. Team onboarding
2. Setting our Purpose
3. Our strengths
4. Our roles
5. Our interdependencies
6. Our challenges
7. We being supportive
8. Closure

Before Starting: presetting the online session

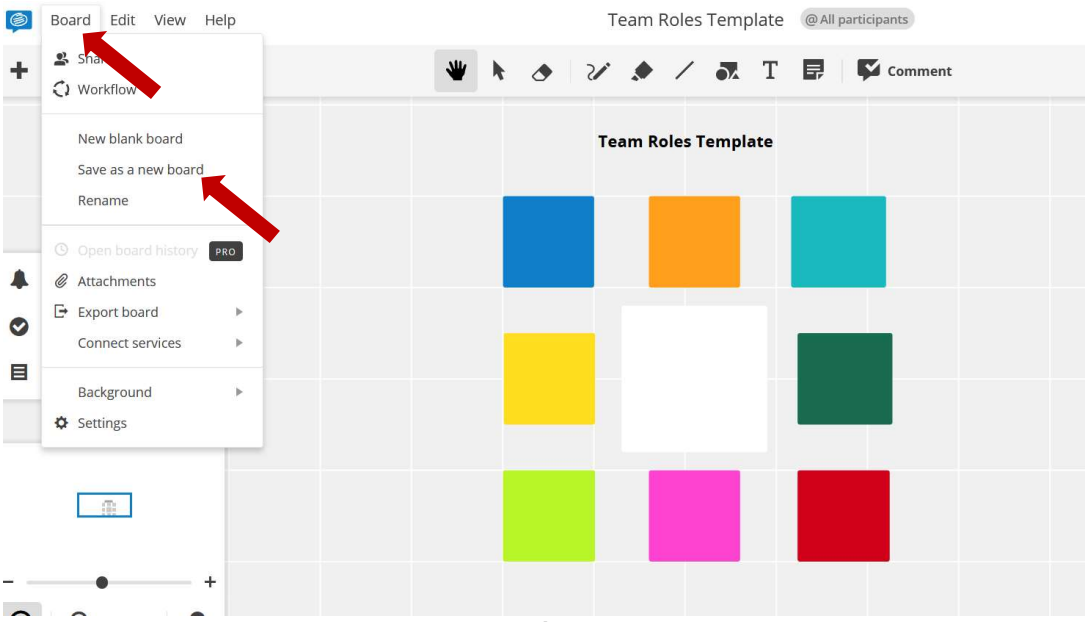
1- The tech tool

a) Sign up for free Conceptboard (www.conceptboard.com)

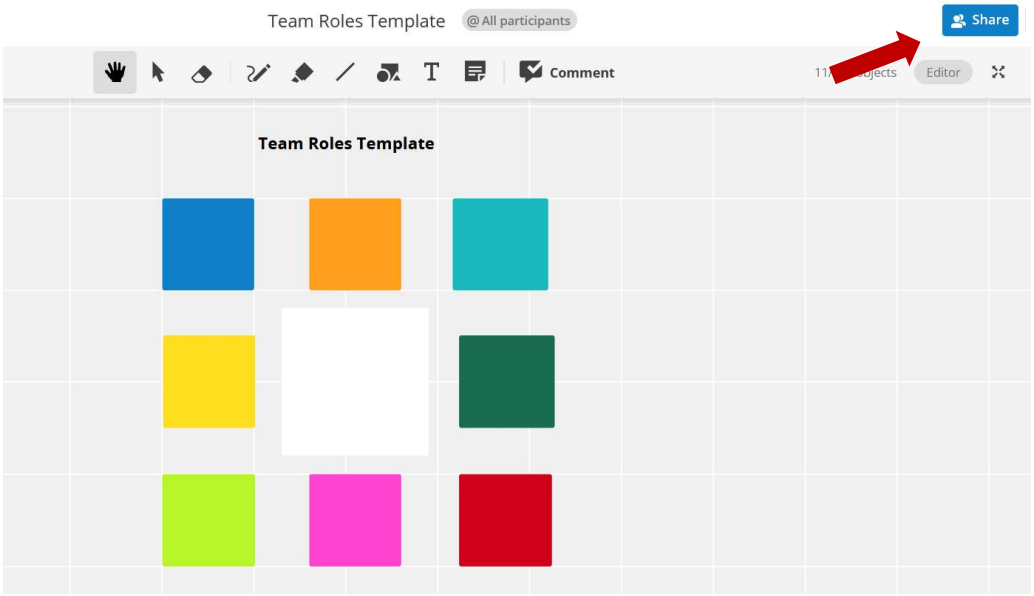
Explore the software a bit, mainly the tools bar and the icons library. You can also decide to follow the software proposed tutorial. Play a bit if you like, but you don't need much to handle your task in the tech field!

b) Go to this link Team Roles Template (and do not change anything, since this is the motherboard for all users).

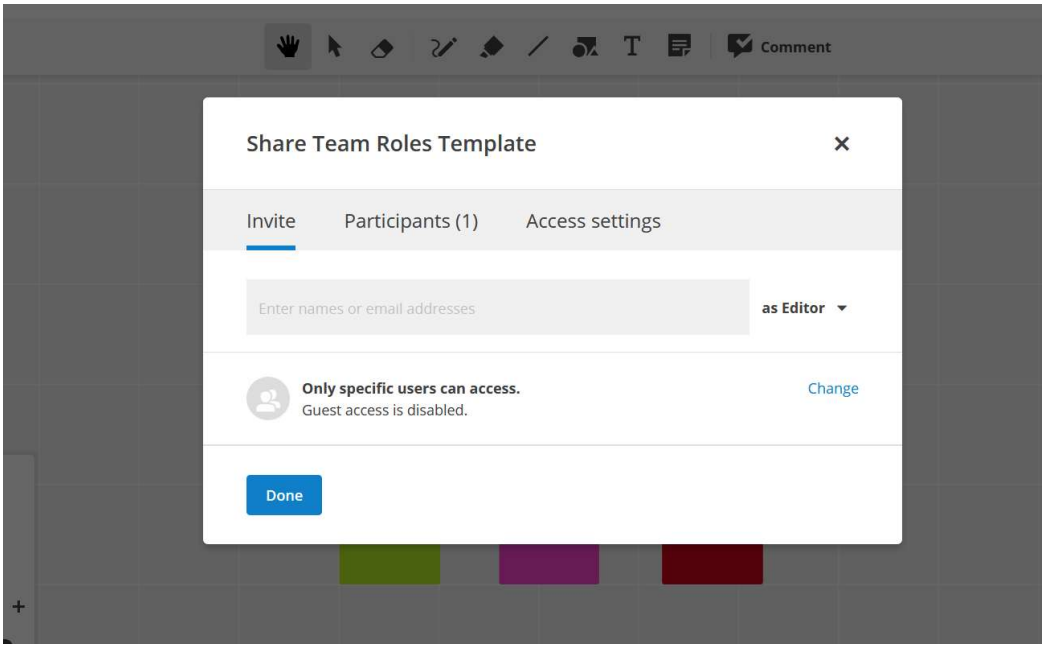
c) Create a TEAM ROLES template for your consultancy session by 1) selecting "Board" in the main menu, and then 2) choosing "save as new board". Give to it a new name (eg. TEAM ROLES Consultancy 22 Jan) TEMPLATE



d) Share the board with the team by clicking the button ‘share



It opens an invitation window. Just invite the team members.



Our suggestion is to share the link only during the consultancy session

2- The video conferencing platform

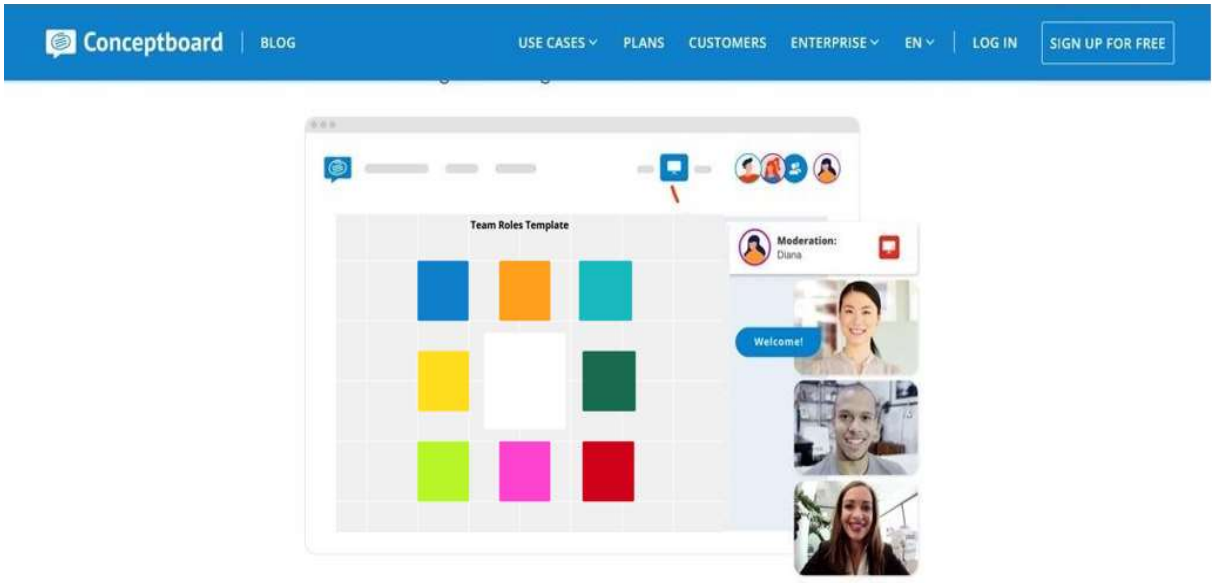
a) Invite the team to an online meeting with the any video conferencing platform (Skype, Zoom, Microsoftteams, …whatever works for you)

b) Ensure you have the link to the TEAM ROLES template before you start the meeting to share it easily when it comes to that phase.

Detailed step description

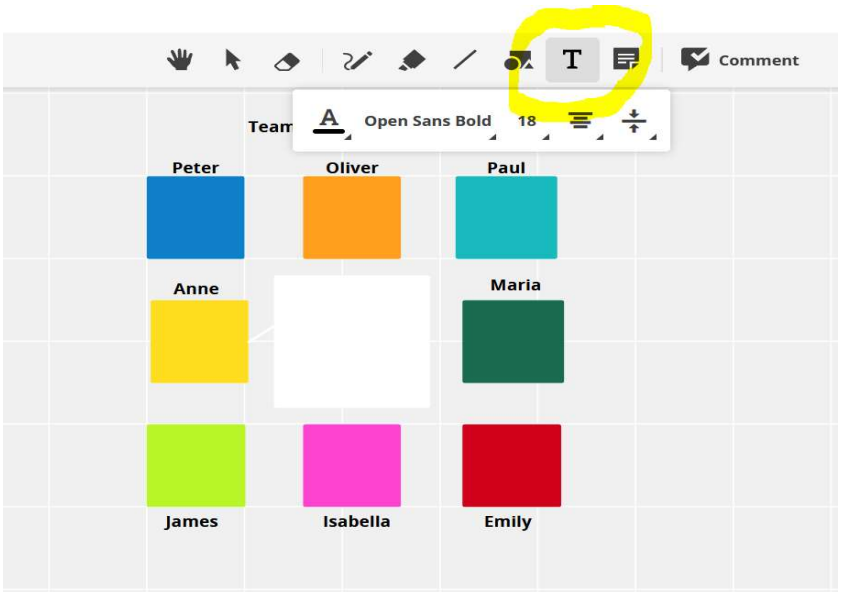
This phase occurs within the videoconference platform (the Conceptboard link was not yet shared)

1. **Team onboarding**
   - Welcome the team.
   - Share the tool link with the team and ask the team members to open it as a Guest, clicking on the “guest access” button.
   - Ask the team not to work on the dashboard until you invite them to do so.
   - Allow some time for the team to open the link and adjust the screen so they may have both the tool dashboard and as many faces on the screen as possible.



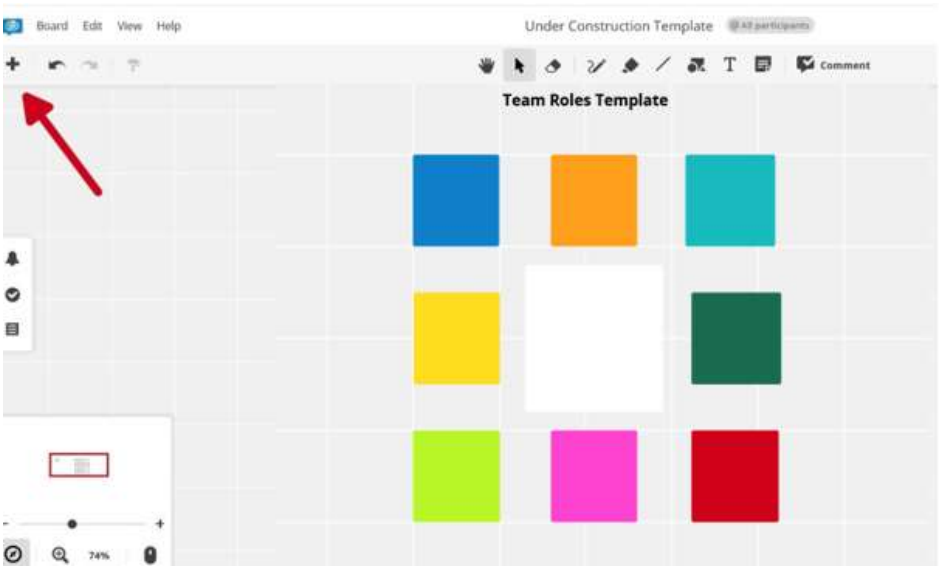
Propose to the team to identify themselves – “who are the members of this team?”

- Invite each member to select a coloured card and to write her/his name on the card using the online pen.

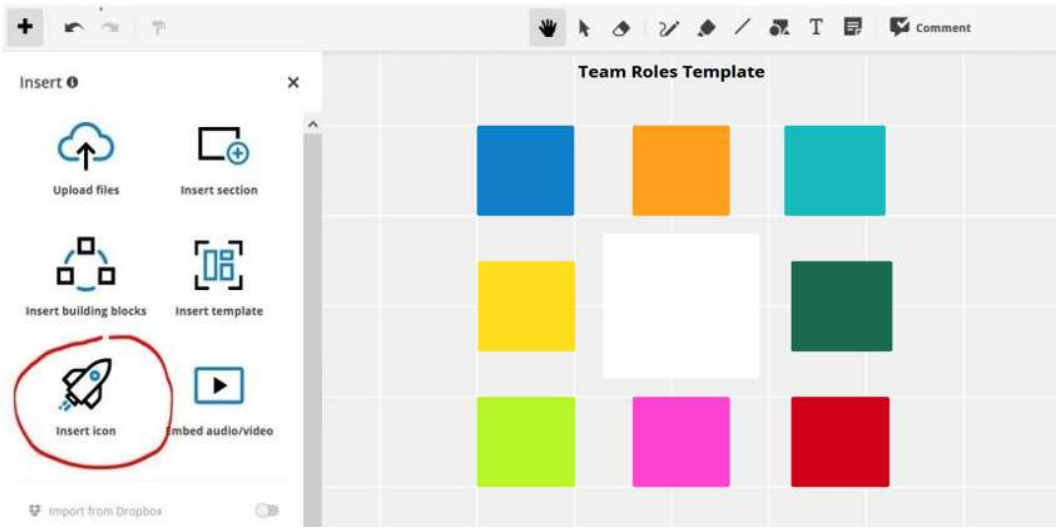


- After every team member has his/her name written down, ask participants to choose a symbol to present her/himself and to place the chosen symbol in the middle of his/her own board.

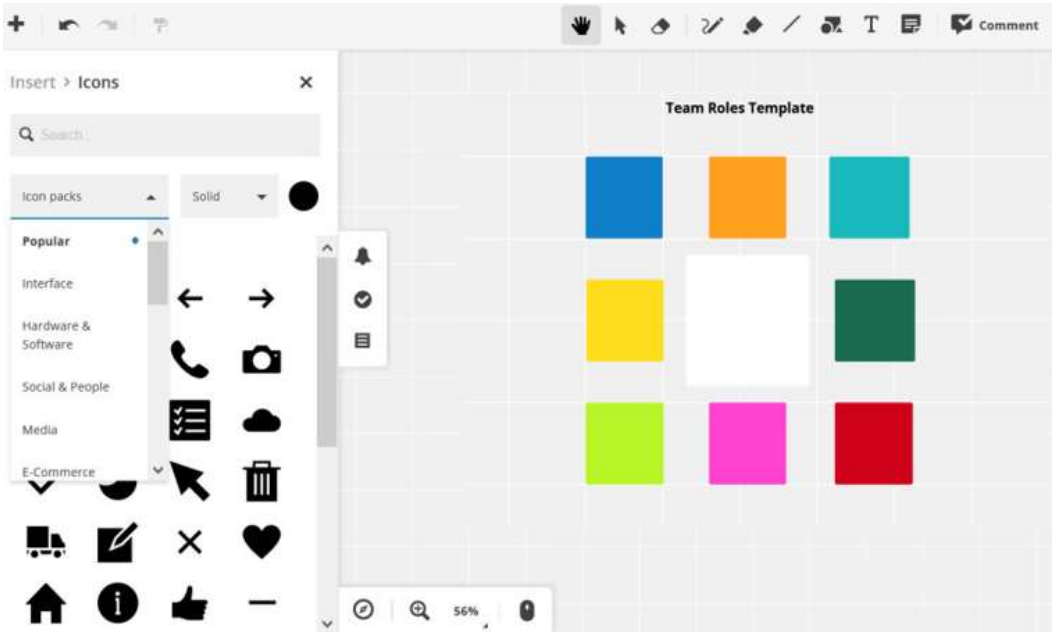
For using symbols, participants should click on the *plus button on the top left side of the boardscreen:



and then select the *rocket button (insert icon button).



Symbols are organised by types in different files. To use them, participants just have to drag symbols to their cards.



2. Setting our Purpose

- Challenge the team to discuss for some minutes (max.10) about the team mission. “Why do we exist?”, “What for?”, “What is our main task?”,” For whom are we doing it for?”, “What is our purpose?”. Explain that this debate is just a starting point for working on it continuously. The intention is to guarantee a common idea of the team existence foundation, not to arrive at a well-defined purpose statement!! Just to ensure that all team members share “why does this team exist?”, “what for”!
- Invite the team to select one symbol that could be placed on the whiteboard that is in the centre and would represent the Team Purpose.

3. Our strengths

- Ask the team members to select another symbol, which would stand for the strength she/ he considers to have to contribute to the success of the team’s purpose. Each person chooses a symbol and places it in his/her own coloured card (next to the first symbol selected).

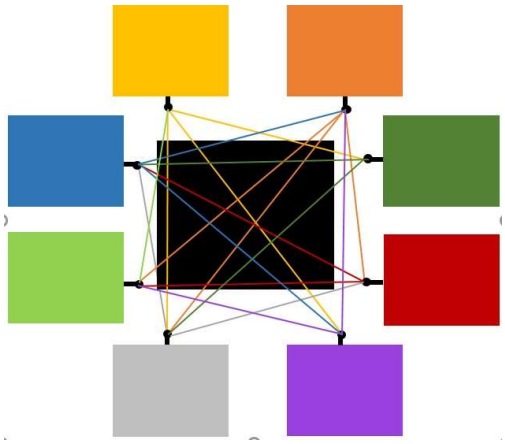
  At this moment, invite each member to present the symbols placed on her/ his individual card and explain: “why did I choose this symbol to present myself” and “why did I choose this symbol to represent a strength that I consider to have to contribute to this team”.

4. Our roles

- The facilitator asks the team members to select between 1 and 3 symbols to represent the roles they consider having in this team. Don’t give any guidance to this task. Let the members identify if they select the symbols (between 1 and 3) at will. Please do not provide any orientation, only “to represent the roles they consider having in this team”
- In the end, each member, at a time, explains the symbols’ selection. Team members may represent tasks, social roles,functional roles… whatever they choose and whatever they represent is ok.

5. Our interdependencies

- The facilitator asks the team members to use the line resource of the toolbar to identify interdependencies between member roles. Participants may represent symbolically all the interconnections they need: just one or with all parties.



6. Our challenges

The scenario is becoming closer to reality: a complex system! The good news: if it looks like a system, it means we have a team! An interdependent system is working as a whole to a common purpose! However, systems and teams face problems, difficulties and different types of challenges.

- The facilitator asks the team members to select a/ another symbol, which will stand for one challenge she/ he considers the team is facing or will face. Each member decides where the symbol should be: in its own card, in another member's card or in the central card. No comments are allowed at this stage.

7. We being supportive

Challenges become easier because, in a team, people are not alone. They support each other for common success, which is one of the most important roles as team members.

- For this reason, this is a precious symbol to be identified.Each member picks one symbol to represent how can she/ he assumes the supportive role and set it next to his/her card.
- After this symbol selection, the facilitator invites each member to place the symbol wherever she/ he wants while explaining why and contextualising it in the own vision of the global perspective developed during this activity.

8. Closure

- If not before, the facilitator invites each member to explain why and to contextualise the chosen symbols in their vision of the global perspective of the activity.
- The facilitator promotes and moderates a small debate/sum up of the developed scenario. The facilitator also asks if someone would like to propose any change to the final symbolic field. This (eventually) last (re) conception prepares, accommodates the changes the team agrees on, and starts the closing of the ultimate setting.
- This closing of the developed scenario could be saying out loud the topics that emerged: be aware of…, be clear about…, future actions…
- In the end, invite team members to register their construction with 2 photos (one just with the symbolic field and another with the team members and the symbolic field) and, writing their conclusions/learning points and/or future actions in the "Conclusions/Learning Points" Template.

In the case you are applying steps individually, provide debate in that specific step.

8.1. Conclusions/Learning Points

CONCLUSIONS / LEARNING POINTS

Team purpose

Topics you have realized which are important for your team/team purpose

Topic 1:	
Topic 2:	
Topic 3:	

To do in the future

Action 1:	
Action 2:	
Action 3:	