Team Role Experience and Orientation (TREO) Exercise

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TREO EXERCISE: INSTRUCTOR'S GUIDE

Preparation

Prior to the exercise review the slides and notes and make copies of the handouts. If possible, have a few calculators available to help people calculate their TREO results. Handouts are shown in red in this guide and include:

- **TREO Teamwork Style Survey**
- **TREO Role Definitions**
- **Our Team's Needs**
- **TREO Scoring Key**
- **Reviewing Your TREO Results**
- **Reviewing Your Team's TREO Results**

We recommend running the exercise with the team leader as a participant. It can be helpful to prepare the leader before the exercise. Let the leader know that they should participate in the session with the team, but suggest that during discussions they let other people comment first and to try not to be the most vocal person during discussions. Otherwise, the exercise might not uncover their team members' thoughts and perceptions.

We also recommend running the exercise after a team has had the chance to work together for a little while. That will allow team members to share their insights about each other.

We estimate that the session will take about 90 minutes, although that may vary based on the engagement of the group.

Running the Exercise

1. **Set the stage for the exercise and describe the objectives to the team.**

- Show slides 1 (title slide) and then 2 (with the objectives)
- Note the importance of teamwork for the success of their team and tell them you will lead them through an exercise that is designed to help them:
  o Become more aware of **their own tendencies** when working in teams
  o Better understand their **teammates' tendencies**
  o Provide a **common way of discussing** teamwork and team roles in the future
  o Establish a few **plans** for working effectively as a team
- **Tip**: To avoid influencing their answers, do not describe the six roles in the TREO until after the participants have completed the survey.

2. **Ask the participants to complete the survey**.

- Handout copies of the **TREO Teamwork Style Survey**. Slow slide 3 and describe the survey. State that the survey asks questions about their prior team experiences and about their preferences.
- Explain that when they answer questions about their experiences they should think about what they have **typically** done when they were on different teams and not simply what they do on the current team.
    - You could ask them to provide examples of the last few teams they have been on to ensure they are thinking about their past experiences and not just their current experience.
- Emphasize that there are **no right/wrong answers**, that you just want them to answer the questions honestly.
- When they are finished, do not collect the surveys as the team members will score their own surveys.

3. Explain the concept of team role tendencies.

- Show slide 4 and provide them with the background information they will need to understand and interpret the survey results.
- Explain that individuals tend to **gravitate towards fulfilling certain team roles**. For example, someone might be more likely to:
    - Organize and provide structure for their team
    - Create connections with people outside the team
    - Challenge assumptions
    - Help ensure team members work well together
- Note that a role is **not necessarily the same** as a position, rank, assignment, or MOS.
    - Naturally, when a person is in a position such as leader, there may be more opportunity to contribute in a role such as organizer.
    - However, team members can often contribute in any role. For example, anyone on the team might help calm people down or motivate team members. A team role simply describes the way someone tends to work within and contribute to a team.
- Handout the page with the **TREO Role Definitions**. Give them a chance to read through the definitions. **Highlight the key elements of each role** (or ask them to share with you what they think each role means – "describe what an organizer tends to do for a team")
    - Organizer
    - Innovator
    - Doer
    - Challenger
    - Team Builder
    - Connector
- Note that each team role can contribute to team effectiveness and that the profile or mix of team member role tendencies can influence how a team works together.
- Emphasize that **it helps to know their own preferences and their team's profile.**

4. **Have the team identify the roles that are needed on their team.**

- Show slide 5 and handout the **Our Team's Needs** worksheet. Give them a moment to review the handout and jot down a few thoughts individually.

- Lead a discussion with the team by asking the questions that follow.
  - The purpose of this discussion is to actively engage the team in identifying what roles are needed on the team. This will provide a point of comparison when they examine their team's results.
  - **Tip**: If you are concerned the group needs to "warm up," you can ask them to discuss the questions in pairs before the group discussion.
- Ask: Which roles do you need people to play on your team? Why?
  - **Tip**: Most (but not all) teams benefit from having each role "filled" by one or more team members.
  - **Tip**: As the facilitator, allow team members time to answer before you provide your opinion or "help them." Sometimes it can then help to provide your perspective, based on your knowledge of the team's mission.
- Ask: Which role(s) are most important for your team's success? Why?
- Ask: Would it be beneficial for your team to have more than one person who scores highly in any of the roles? If so, which role(s)? Why?
  - The purpose of this question is to have the team think about the need for multiple people to perform some roles (e.g., is one person who tends to innovate enough?)
- Ask: Could having several team members who tend to gravitate to the same role create any problems for your team? For example...
  - What could happen if most team members tend to be organizers?
  - What could happen if most team members tend to be challengers?
  - **Tip**: Teams that have many organizers can sometimes "get in each other's way." Teams with many challengers can spend a lot of time debating issues.
- Ask: So, what would be an ideal mix for your type of team?

5. **Have team members score their own TREO survey.**

- Show slide 6. Handout the **TREO Scoring Key**.
- Ask them to use the handout to individually score and interpret their TREO survey.
- Explain that they will get a score from 1 to 5 for each role. A higher score suggests they are more likely to and/or prefer to play that role on teams. They can score high or low on more than one role.

6. **Ask participants to pair up and discuss their results.**

- Show slide 7. Hand out the **Reviewing Your TREO Results** sheet. Ask the participants to pair up and discuss their results using the handout as a guide.
- Explain that they should focus on one person's results first. That person should share their scores, noting their highest and lowest scores. They should then note where they agree or disagree with their TREO results. Finally, the other person can provide their observations from training/working with the first person, noting where they agree or disagree with that person's TREO results, and pointing to actions/behaviors they've seen.

- Then, the pairs will switch and focus on the second person.
- You can then ask the group if they felt their TREO scores were fairly accurate.
- **Tip**: Sometimes other members of the team will disagree with a person's self-rated TREO score. That may be because the self-ratings were somewhat off, but it may also be because not every team situation calls for or even allows a person to consistently help the team by playing their preferred role.

As a general rule of thumb, the table below suggests whether a score could be considered higher, medium, or lower.

Role Score	
4.2 to 5.0	Higher
3.3 to 4.1	Medium
1.0 to 3.2	Lower

Below are TREO data from approximately 1050 members of Transition Teams (TT). It shows their average TREO score for each role and the scores that define the top and bottom 25% of the sample.

Remember, there isn't a correct TREO score. This data simply provides you with an idea of how prior transition team members scored on the TREO.

Role	Average Score	25% scored this or lower	25% scored this or higher
Organizer	3.64	3.25	4.00
Innovator	3.75	3.38	4.13
Doer	4.13	3.88	4.50
Challenger	3.61	3.25	4.00
Team Builder	4.14	3.88	4.50
Connector	3.82	3.42	4.25

7. Have the participants post their scores.

- Show slide 8. Set up a flip chart as a matrix with a column of team members' names and a place for their TREO scores as shown below:

Name	Organizer	Innovator	Doer	Challenger	Team Builder	Connector
Joe	4.2	3.9	etc.			
Sally						
Bob						

- Ask participants to post their scores on a flip chart (record one decimal only).

8. Review the team's profile.

- Show slide 9 and provide them with the **Reviewing Your Team's Results** handout. Tell the group that they will be discussing these questions.
- Allow them a few minutes to review the results individually and to record their observations on the handout.
- Then, lead a group discussion by asking the questions below.
- **Tip**: If the group is fairly quiet, you can ask them to discuss their observations in pairs, before discussing as a large group. If the group is boisterous and open or if you don't have time, you can go directly into the group discussion.
- **Tip**: If it helps, you can calculate column averages or circle numbers on the chart (e.g., scores 4.2 or above) during the discussion.
- Ask: How accurate were the TREO scores? Any **surprises**?
- Ask: How would you describe your **team's overall profile**?
  o Your team has people with high scores in which roles?
- Ask: How does this **compare** with the earlier discussion about **your team's needs**? Does your team's role tendencies match your stated needs?
- Ask: How might your team's role profile **help** your team succeed?
  o It helps that we have _____
- Ask: Are there any potential **trouble** spots?
  o We have a lot of _____ which could _____.
  o We may not have enough _____ which could _____.
  o We have someone who is assigned to a position that may play against their natural tendencies.
- **Tip**: The last question on the handout can be discussed during the next step.

9. Provide the team with an opportunity to identify any action plans.

- Show slide 10. Ask: First, let's start individually. How would you **describe your own role tendencies**? Anything to keep in mind?

- Ask: Now let's look at our team. How can **we best use our team members' strengths and inclinations** to ensure our team's effectiveness? What should we be **alert** to as a team?
- Ask: What should we do to overcome or avoid any concerns we identified?
- **Tip**: Not every team will generate a list of actions. Sometimes the value of this exercise is in providing them with a chance to reflect, learn about other team members, and have a language for discussing each other's tendencies when they are working as a team. However, **if the group generates some tangible agreements, be sure to capture them on a flip chart** and provide them to the group or team leader after the exercise.
- **Tip**: As the training proceeds, look for opportunities to re-introduce and discuss team role needs and preferences as a way of getting the team to think about how they can work together effectively and contribute to the team's success.
- **Tip**: Below is a table with a few insights about each of the six roles and what can happen when a team has the right amount, too many, or too few people with a particular role orientation. You can use these ideas when you facilitate the team discussion.

	Potential Synergies	Potential Breakdowns if Team has...		If this is a concern...
	Right Amount	**Too Many**	**Not Enough**	**Ideas**
Organizer	Helps the team stay focused and on task; Work is assigned effectively; Better able to monitor team performance, know how well you are doing, make corrections	Too many people trying to guide and organize the team; Too many emergent or self-appointed "leaders"; Can be stressful; Can slow things down	Not enough structure and organization provided for the team to thrive; Team can wander off task and miss targets	**Not Enough**: Ask the leader to be more active or to appoint someone to maintain structure/organization. **Too Many**: Establish clearer team roles. Clarify who will organize particular tasks and make certain decisions; Agree not to "re-structure" a task based only on personal preferences.
Innovator	Regularly generates new and creative ideas; More likely to improve processes and approach	Too many suggestions for "new" approaches, particularly when the team has a well-defined, set task or is past the "brain-storming" phase of work	Not very creative in problem solving or idea generation	**Not Enough:** Set aside ample time for "brainstorming" and idea generation; Encourage people to share new ideas; Be careful not to shut down people when they offer ideas. **Too Many**: Reach a clear agreement when innovation time is over and execution time has begun.

	Potential Synergies	Potential Breakdowns if Team has...		If this is a concern...
	Right Amount	Too Many	Not Enough	Ideas
Doer	Individual assignments are executed; Team members step up to take on work as needed; Timeline is maintained	Some potential for social loafing – members can assume that there are enough other team members who will take on a task	Insufficient volunteering; Insufficient focus on getting things done; If only one "doer" that person can burn out; If some perceived as not "doing," can create resentment	**Not Enough:** Have a team conversation about "stepping up" and getting work done; Hold people accountable for their work and commitments. **Too Many**: Ensure everyone has the chance to make meaningful contributions.
Challenger	Effectively challenges assumptions and one another; Can result in better decisions	Spend too much time challenging and critiquing one another; Can result in a culture of "critiquing"; Can eventually inhibit people from offering ideas	Group think and agreeing too easily (unwillingness to disagree or confront others); Bad ideas go unquestioned	**Not Enough:** Allocate time specifically to challenge ideas; Ask people to play "devil's advocate" and challenge things even if they agree; Make it safer to challenge one another. **Too Many**: Establish occasional "no critique" times; Agree that during the next 20 minutes, any critique must be paired with an alternative (so not just "target shooting" others' ideas).
Team Builder	Team morale and energy is high; Team members work well together; Team members provide mutual support for one another; Conflicts resolved effectively	Too much time spent on "social" concerns and interaction – not enough time on task	Team members frustrated or not supportive of one another; Conflict among team members is not handled effectively	**Not Enough:** Have the team leader periodically "take the pulse" and address concerns; Organize team events and ensure team members know one another; Learn better conflict resolution skills. **Too Many**: Be sure that sufficient time is spent doing and on task, and not simply "getting along."
Connector	Team has strong relationships with key stakeholders outside the team	Too strong a connection and focus on the "outside" to the detriment of team goals and needs; Interference from "outside"	Team operates in isolation; Too inwardly focused; Team lacks support or resources from others	**Not Enough:** Identify the key stakeholders outside the team; Discuss their needs and concerns and what the team needs from them; Assign individuals or pairs to focus on each key stakeholder. **Too Many**: Spend sufficient time as a team; Re-visit the team's mission, priorities, and plans as a team.

TREO Role Definitions

The TREO examines six common team roles that people might perform when on a team. At different times you might play any of these roles but you probably tend to do (or prefer to do) some roles more than others. The role(s) you fill need not be related to your official position or assignment on the team. They simply describe the way you work and contribute to a team. A description of each role appears below:

Role	*Someone who scores high on this role typically does the following...*
ORGANIZER	Acts to structure what it is that the team is doing. An organizer also keeps track of accomplishments and how the team is progressing relative to goals and timelines.
INNOVATOR	Regularly generates new and creative ideas, strategies, and approaches for how the team can handle various situations and challenges. An innovator often offers original and imaginative suggestions.
DOER	Willingly takes on work and gets things done. A "doer" can be counted on to complete work, meet deadlines, and take on tasks to ensure the team's success.
CHALLENGER	Will push the team to explore all aspects of a situation and to consider alternative assumptions, explanations, and solutions. A challenger often asks "why" and is comfortable debating and critiquing.
TEAM BUILDER	Helps establish norms, supports decisions, and maintains a positive work atmosphere *within the team*. A team builder calms members when they are stressed, and motivates them when they are down.
CONNECTOR	Helps bridge and connect the team with people, groups, or other stakeholders *outside of the team*. Connectors ensure good working relationships between the team and "outsiders," while team builders work to ensure good relationship within the team.

Our Team's Needs

For each role, place a check mark in the appropriate columns if the role is **Needed** on your team, if the team would benefit from having **More than one person** fill that role, and if the role is **Among the most important**. Then, for any role with one or more checks, note **Why this role is needed.**

Role	Needed on our team?	Need more than one person?	Among most important?	Why Needed?
Organizer				
Innovator				
Doer				
Challenger				
Team Builder				
Connector				

Could having too many people who gravitate to the same role ever create any problems for our type of team? For example...

- What could happen if most team members tend to be "organizers"?
- What could happen if most team members tend to be "challengers?"

So, what might a good mix "look like" for our team? What does our team need to be successful?

TREO Scoring Key

1. Insert your score (1 to 5) for each question above the question number.
2. Add the eight scores in each row to get a Row Total (8 to 40).
3. Divide the row total by 8 to get your Role Score (1.0 to 5.0).

	Write in Your Score For Each Question								Add Row Total	Calculate Role Score (Total/8)
Organizer Question #	5	8	17	18	26	28	30	36		**Organizer**
Innovator Question #	6	13	27	29	33	35	38	44		**Innovator**
Doer Question #	3	12	15	16	21	24	25	41		**Doer**
Challenger Question #	2	4	9	10	14	32	42	47		**Challenger**
Team Builder Question #	7	11	19	37	39	40	43	48		**Team Builder**
Connector Question #	1	20	22	23	31	34	45	46		**Connector**

Reviewing Your TREO Results

1. Review your own TREO results. In which roles did you score highest? Lowest?

2. How do you interpret your TREO results? Based on your TREO scores, what are your team role tendencies? Examine the role definitions again. Do you agree with your TREO results?

3. Share your results with the person with whom you are paired. Show them your results and share your interpretation.

4. Ask your partner for their observations of you. Which roles do they see you tend to gravitate towards? Where do they agree/disagree with your TREO results? Why?

5. When you have finished reviewing one set of TREO results, switch and do the same for the other person.

Reviewing Your Team's TREO Results

Take a few moments to review your team's TREO scores. Jot down a few notes for each of the items below and be prepared to discuss your observations.

1. Do you think the TREO scores are fairly **accurate**? Which scores, if any, **surprised you**? Where do your observations of a team member differ from their TREO scores?

2. Examine the team's overall results. How would you **describe your team's overall profile**? Which roles have people with very high scores? How do the results compare with the earlier discussion of your team's needs? Do they match your stated needs?

3. How might your team's role profile **help your team succeed**? For example, finish the sentence, "It helps that we have _____."

4. Do you see any **potential trouble spots**? For example, "We have a lot of people who _____, which could _____." Or, "We may not have enough people who _____, which could _____."

5. How could your team take **advantage of its strengths**? What could the team do to **off-set or avoid any potential trouble** spots?