

# Making the Most of Progress Reports

## What is the Progress Report?

*The Five Behaviors of a Cohesive Team™ Progress Report* shows how a team's performance has changed over time and highlights areas of greatest improvement and greatest decline. It includes the Team Survey Results, Points of Discussion, a Conflict Team Map, an Action Plan that helps the team set goals and identify areas for improvement, and personalized information for each team member. The report, which is included with the purchase of the initial Five Behaviors profile, is created based on a brief follow-up assessment administered to the team after the original Five Behaviors engagement.

## Why use the Progress Report?

The *Five Behaviors of a Cohesive Team* program is a framework that helps team members have deeper conversations about how they work together on a day-to-day basis. It's a program that is rich enough for a team to come back to again and again. The Progress Report, which will ideally be discussed in a facilitated follow-up session to the original program, is designed to show a team how its behaviors have changed compared to the last time the team was assessed. In addition to showing the improvements on the team, the report outlines challenges that may be hindering further development.

## Who is it for?

Any team that was a good candidate for The Five Behaviors program is qualified to use the Progress Report. You may want to review the text on assessing a team's readiness in the Getting Started section of your facilitation kit to make sure the team is still a good fit.

## When do I use the Progress Report versus starting over?

If a team has a new leader, we recommend the team retake the original Five Behaviors assessment. Additionally, if more than 40 percent of the team has changed since the original assessment was administered, we recommend readministering the assessment and having the team create new action plans for improvement.

## What do I do when a new member joins the team?

If one or two people have joined the team since the original assessment was completed, you can add their data to the Progress Report. New team members will have a longer assessment experience, since they'll have to answer some questions their teammates completed as part of the original assessment.

You may want to recommend new team members read *The Five Dysfunctions of a Team* in order to give them a deeper understanding of the model. Alternatively, you could meet separately to bring new team members up to speed prior to any engagement with the whole team. It might also be helpful to assign a "buddy" on the team to help the new person or people understand how the team has been working on the behaviors and/or implementing action plans.

## When is the right time to use the Progress Report?

The Progress Report can be run at any point following the initial Five Behaviors assessment and as often as necessary based on the needs of the team. Each team's unique situation will dictate when and how often you run the reports. If the team has been working on its development and has seen a change for better or worse, it may be a good time to run the Progress Report. You can also run the reports regularly as progress checks for the team. Just be sure to give team members enough time to implement any action plans they committed to for the program before running the reports.

## How much time should I plan for a Progress Report session?

The needs of the team and your goals as a facilitator will dictate the length of the session, but you may want to plan anywhere from two to six hours for it.

## What are the best practices for using the Progress Report?

- If you know during a team's initial Five Behaviors engagement that you'll be following up with the Progress Report, set expectations during your initial session. This lets the team members know that The Five Behaviors program is a process that requires them to keep working toward improvement.
- Keep in mind that once you run a Progress Report, every report run after that is compared to the previous Progress Report—not the original report.
- Before you distribute the reports, start the session with a refresher on the Five Behaviors model. It may be helpful to show some of the videos from *The Five Behaviors of a Cohesive Team™* Facilitation Kit describing the model and individual behaviors. To get people back in the right mindset, you could also take participants through the Personal Histories exercise again using the alternate questions included in Module 2 of the Facilitator's Guide.
- Use the report as a conversation starter about where the team is and where it wants to be. Be sure to include in the conversation a discussion of the action plans the team created previously for the Five Behaviors program, including any progress and setbacks the team has faced in meeting its goals.
- When reviewing the pyramid on page 3 of the report, remind the team to look at the numbers in addition to the colors to gauge improvement—the colors only tell part of the story.
- Keep in mind that lower scores don't necessarily mean things are getting worse. Instead, people may have been more candid when answering questions in the follow-up assessment, or they may have become more aware of certain behaviors.
- Remind team members that the Progress Report is only ONE way to determine how far the team has come. The team may be seeing improvements that aren't reflected in the scores. This should be part of the overall discussion during the session. In fact, before you launch into a discussion of how the team can improve, you might want to take a moment to have participants reflect on what they've already accomplished.