

# Operational **Excellence**

## Setting Your Project Team Up for Success

NCCI – January 15, 2025



THE UNIVERSITY  
of NORTH CAROLINA  
at CHAPEL HILL





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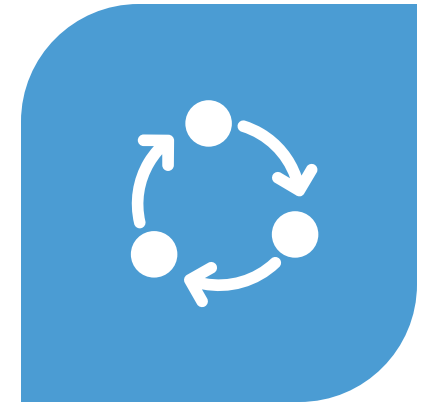
# Operational Excellence Scope



Plan and Execute Executive  
Level Projects



Transform University Wide  
Administrative Operations



Develop Continuous  
Improvement Competencies  
Across Campus



## Objectives



Understand the key phases of team formation and how to move through them effectively.



Understand how to use diverse thinking preferences to improve collaboration.



Understand how to identify and assign roles and responsibilities when working on a project.



# Agenda

- Establishing Team Norms
- Stages of Group Development
- Thinking Preference
- RACI Matrix
- Case Study – Defining Roles and Responsibilities





## What do you need from this team?

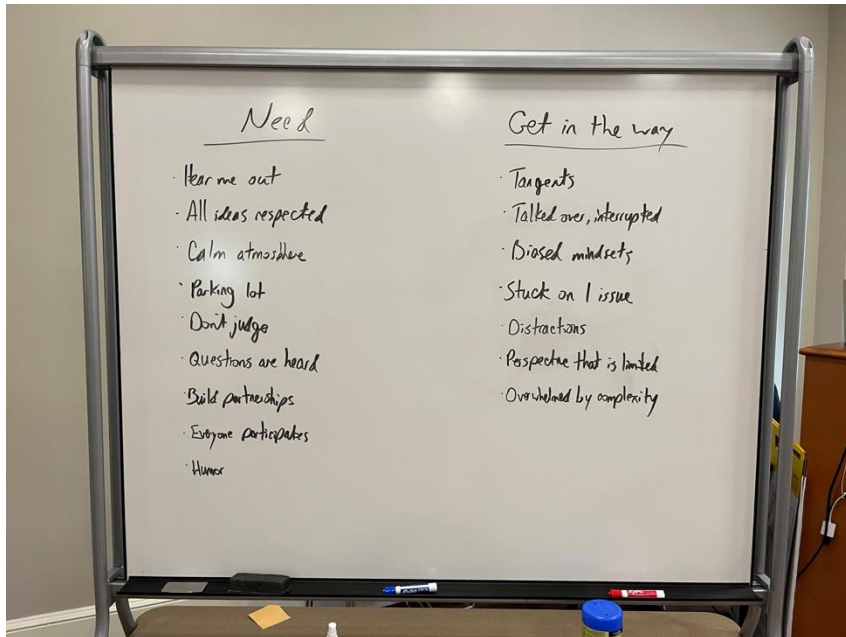
1 thing you need  
to feel safe  
sharing ideas &  
asking questions

1 thing that will  
get in the way of  
you fully  
engaging





# What do you need from this team? (reminder after first workshop)



1 thing you NEED to feel safe sharing ideas & asking questions

- Hear me out
- All ideas respected
- Calm atmosphere
- Keep a parking lot
- Don't judge
- Questions are heard
- Build partnerships
- Everyone participates
- Humor

1 thing that will GET IN THE WAY of you fully engaging

- Tangents
- Talked over, interrupted
- Biased mindsets
- Getting stuck on one issue
- Distractions
- Limited perspectives
- Overwhelmed by complexity



## Team Norms

**Put on your university hat** and advocate for solutions that are in the best interests of the Carolina community

**There are no bad ideas** so brainstorm fearlessly and encourage others to do the same

**Step up, Step back** – if you don't share often, step up; if you may be sharing too often, step back

**Think big** to identify solutions that will transform our way of working

**Take ownership of the process** – if you won't advocate for the vision then nobody will!





## What do you need from this team?

1 thing you need  
to feel safe  
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1 thing that will  
get in the way of  
you fully  
engaging



Reference norms we talked about today

Make specific norms for your team by thinking through the following questions

- What is the expectation for replying to emails or messages? 24 hours? 48 hours?
- In meetings should everyone have their camera on? Or does it not matter to your team?
- What does punctuality mean to your team? Is it okay if people are 5 minutes late?
- What does active participation mean?
- How does each member of the team like to receive feedback?
- If you are frustrated about something, how will you address it?
- What do you think about deadlines? Work up until the end or have it done early?





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**What are the pros and cons  
of working on a team?**





## + / - of Teamwork

Teams outperform  
individuals

Teams can be more  
innovative

Teams can improve  
decision-making

Groupthink

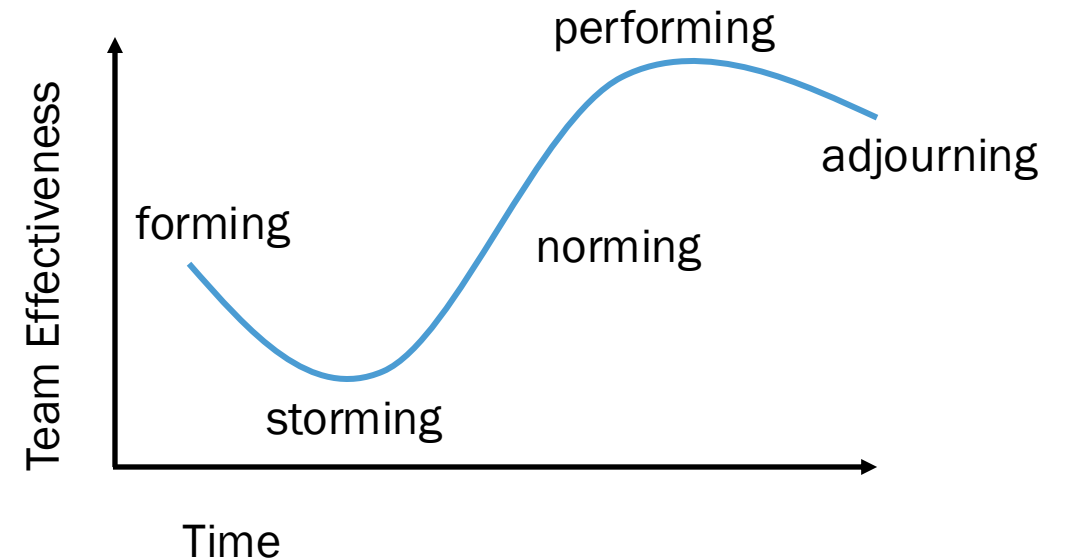
Social loafing

Potential for conflict



## Tuckman's 5 Stages of Team

Bruce Tuckman conducted and evaluated studies on group development and found that small groups ( $\leq 10$  people) generally followed five stages.







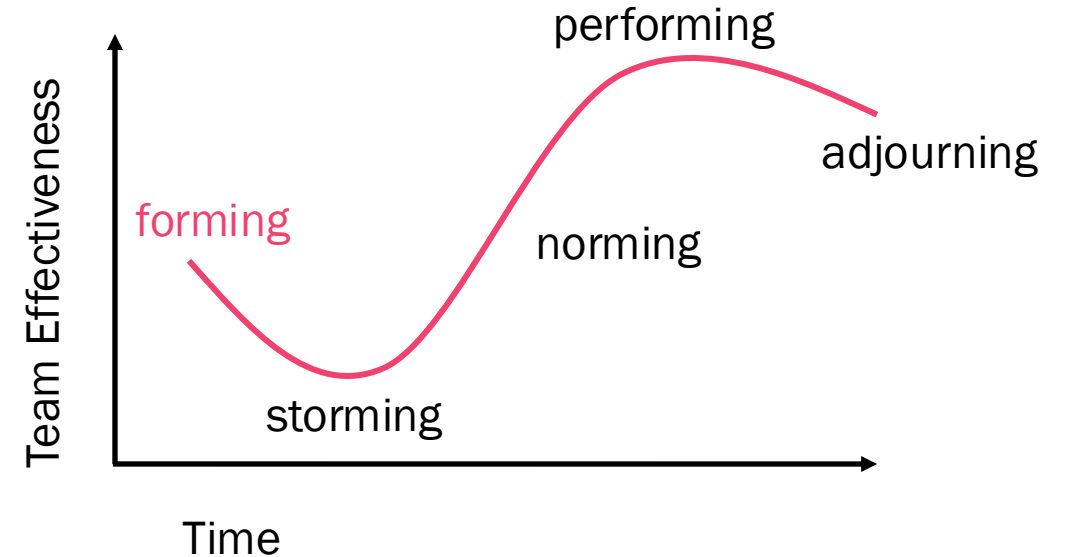
# Forming

What thoughts, feelings, or behaviors could define this phase?

- Anxious
- Curious
- Excited
- Eager
- Socializing
- Generally polite tone
- Sticking to safe topics

## Key Actions for Success

- Learn about each other (backgrounds, strengths, weaknesses)
- Establish team norms
- Define success for the project
- Assign roles and responsibilities



You must get out of your comfort zone to move to the next stage.



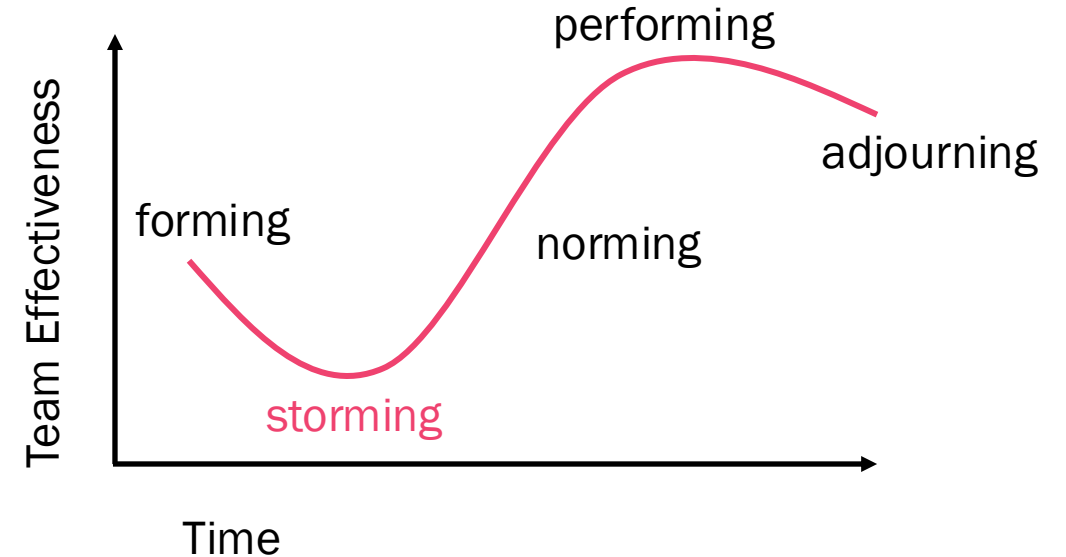
# Storming

What thoughts, feelings, or behaviors could define this phase?

- Pushing boundaries
- Competition
- Conflict
- Some resistance
- Lack of participation

## Key Actions for Success

- Accept that this rough patch is a part of the process
- Build trust by honoring commitments
- Practice listening to understand
- Respectfully challenge each other's ideas
- Request and encourage feedback
- Reflect on what you need from the team and ask for it



This stage can make or break a team.



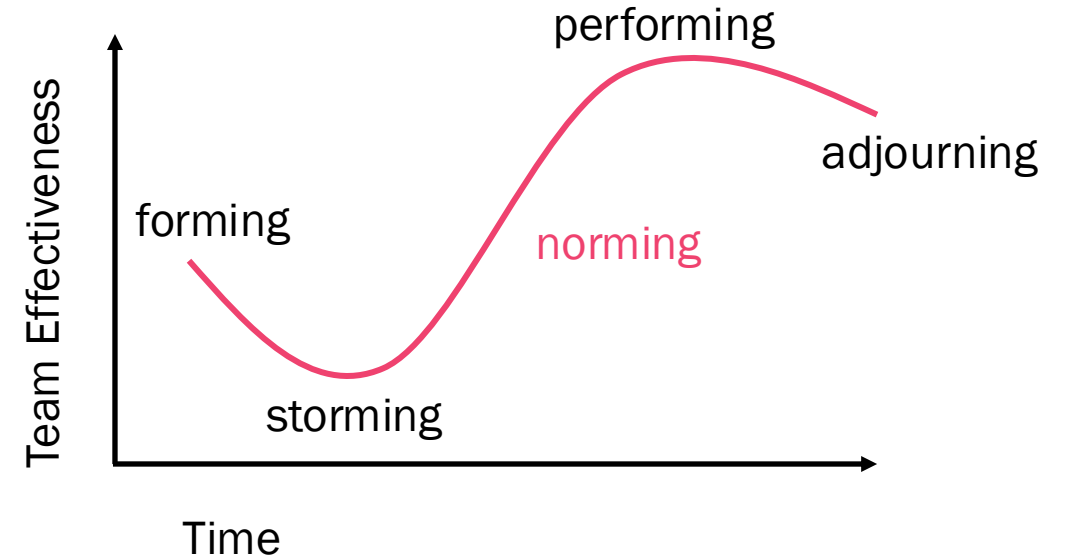
# Norming

What thoughts, feelings, or behaviors are signs of this phase?

- Engaged
- Supportive
- Relief
- Lowered anxiety
- Developing cohesion
- Open discussion
- Feeling like a team

## Key Actions for Success

- Finalize team norms, roles and responsibilities, and expectations
- Respectfully challenge and share ideas
- Continue to solicit and give feedback
- Think about how you can make the collaboration even better and share with the group







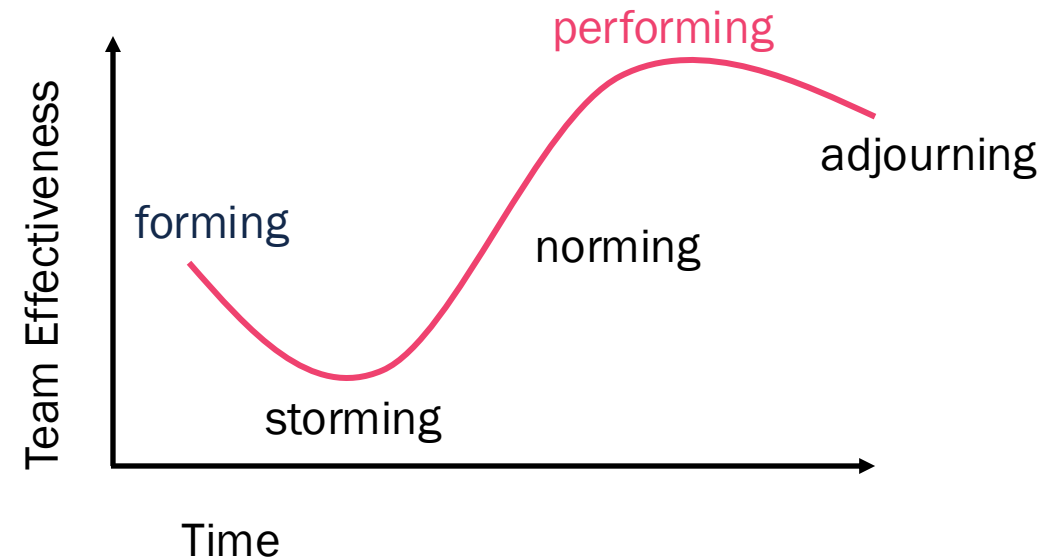
# Performing

What thoughts, feelings, or behaviors are signs of this phase?

- High motivation
- Trust
- Empathy
- Differences appreciated
- Effectively producing deliverables

## Key Actions for Success

- Encourage collective decision-making & problem-solving
- Communicate effectively and frequently
- Keep raising the bar

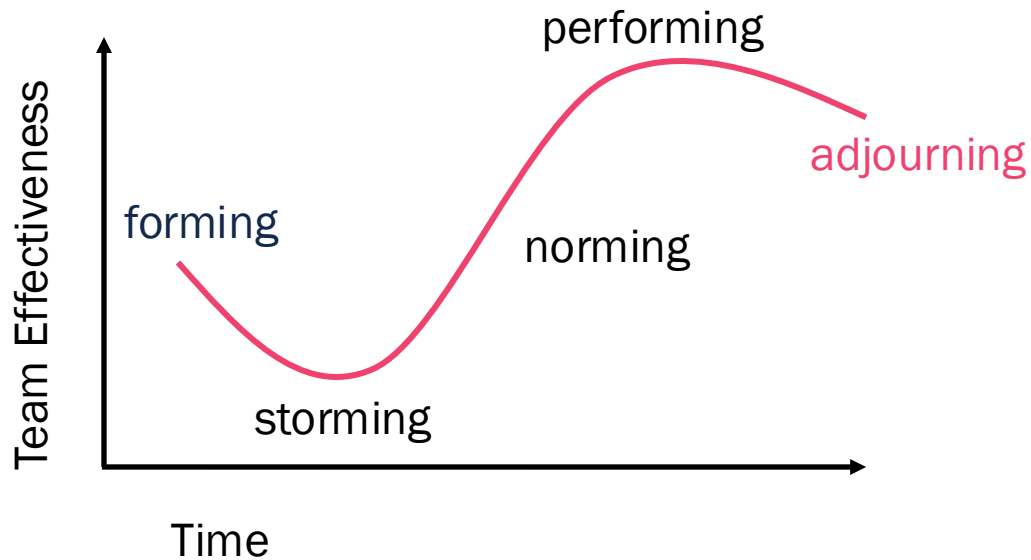




# Adjourning

What thoughts, feelings, or behaviors are signs of this phase?

- End of the project
- Relief



## Key Actions for Success

- Celebrate
- Recognize everyone's contributions
- Reflect on the project individually and as a group
  - What did you learn and could use in the future?
  - What would you do differently if you did something similar again?
- Seek feedback from your peers
  - What are your strengths?
  - What are your biggest opportunities to grow?



## How to Apply the 5 Stages

Recognize that there will be a challenging phase and it is a natural part of the team-building process.

Confronting the storming phase with awareness will make it easier to navigate.



Share with your partner the stage your current team is at and key actions you want to take?





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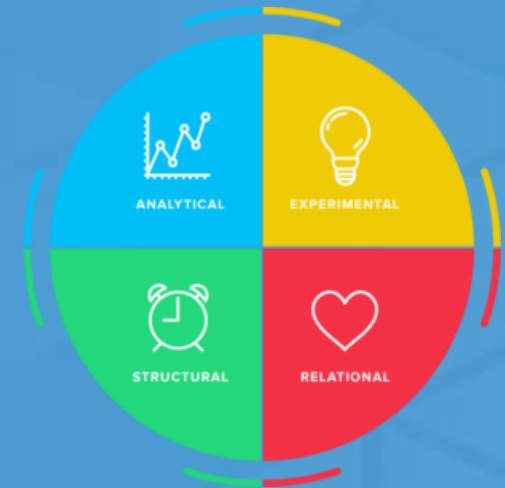
# Have you taken a personality quiz before?



Enneagram

<b>INTJ</b> THE ARCHITECT IMAGINATIVE STRATEGIC PLANNERS	<b>INTP</b> THE LOGICIAN INNOVATIVE CURIOUS LOGICAL	<b>ENTJ</b> THE COMMANDER BOLD IMAGINATIVE STRONG-WILLED	<b>ENTP</b> THE DEBATER SMART CURIOUS INTELLECTUAL
<b>INFJ</b> THE ADVOCATE QUIET MYSTICAL IDEALIST	<b>INFP</b> THE MEDIATOR POETIC KIND ALTRUISTIC	<b>ENFJ</b> THE PROTAGONIST CHARISMATIC INSPIRING NATURAL LEADERS	<b>ENFP</b> THE CAMPAIGNER ENTHUSIASTIC CREATIVE SOCIABLE
<b>ISTJ</b> THE LOGISTICIAN PRACTICAL FACT-MINDED RELIABLE	<b>ISFJ</b> THE DEFENDER PROTECTIVE WARM CARING	<b>ESTJ</b> THE EXECUTIVE ORGANIZED PUNCTUAL LEADER	<b>ESFJ</b> THE CONSUL CARING SOCIAL POPULAR
<b>ISTP</b> THE VIRTUOSO BOLD PRACTICAL EXPERIMENTAL	<b>ISFP</b> THE ADVENTURER ARTISTIC CHARMING EXPLORERS	<b>ESTP</b> THE ENTREPRENEUR SMART ENERGETIC PERCEPTIVE	<b>ESFP</b> THE ENTERTAINER SPONTANEOUS ENERGETIC ENTHUSIASTIC

Myers-Briggs  
Type Indicator



Hermann Brain  
Dominance  
Instrument





## FourSight Thinking Profile

FourSight was developed by Gerard Puccio, PhD, to help understand why people respond differently to the steps, stages, and tools of problem-solving.

The model aligns thinking preferences with the problem-solving process stages.

Your thinking preference is the phase of the problem-solving process where you feel most energized and engaged.







## Thinking Preference Quiz

# The New York Times

The New York Times partnered with FourSight to create an abbreviated quiz.



As we walk through the questions make sure to record the letter of the answer that most aligns with your preference on a sticky note.



## I'm most motivated by...

A

A need for a clear understanding of facts

B

A great idea

C

An opportunity to perfect an existing solution

D

A job to do



## I learn best through...

A

Facts, research,  
data

B

Stories, ideas,  
concepts

C

Evaluating  
options

D

Trying things out



## I like to spend time...

A

Working with  
information

B

Thinking about  
new possibilities

C

Making things  
“just right”

D

Testing,  
prototyping,  
doing



**Count your  
number of A's, B's,  
C's, & D's?**



# Thinking Preference

A

## CLARIFIER

Cautious, structured thinker who likes to gather data to understand the reality and to identify problems, gaps, opportunities

B

## IDEATOR

Playful, original thinker who likes to see the “big picture” and make new connections that may break the paradigm

C

## DEVELOPER

Detailed planner who likes to evaluate and perfect the best version of a solution and anticipate how it will move forward with the most success

D

## IMPLEMENTER

Confident, action-oriented risk taker who likes to learn by doing

No preference?

50% of people have 2+ preferences



## Clarifiers

- Like to spend time getting a clear understanding of a challenge or issue before leaping into ideas, solutions, or action
- Prefer to move forward cautiously, making sure the right challenge is being addressed
- May suffer from “analysis paralysis”

“Let’s not make any assumptions”

Clarifiers annoy others by

- Asking too many questions
- Pointing out obstacles
- Identifying areas that haven’t been well thought out
- Overloading people with information
- Being too realistic

Focused

Organize

Methodical

Deliberate

“What’s the real problem?”



# Ideators

- Like to generate broad concepts and ideas
- Are flexible thinkers and can see many possible solutions
- May jump from one idea to the next, without following through

May annoy others by...

- Being impatient when others don't get their ideas
- Offering ideas that are too off-the-wall
- Being too abstract
- Not sticking to one idea



"I've got an idea"

**SOCIAL** *Imaginative*

*Flexible*

Adaptabl

e



"What are the possibilities?"





## Developer

- Like to spend time analyzing potential solutions, breaking them apart and examining their strengths and weaknesses
- Likes to examine the pluses and minuses of an idea
- Enjoys planning the steps to implement an idea
- May get stuck in developing the perfect solution

Developers annoy others by...

- Being too nit-picky
- Finding flaws in others' ideas
- Getting locked into one approach

**Cautious**

“How can we take this from good to great?”

Logical

Reflective

“Let’s weigh our options”

Structured



# Implementer

- Implementers strive constantly to take action on ideas
- Likes to see things happen
- Enjoys giving structure to ideas so they become a reality
- Likes to focus on “workable” ideas and solutions
- Implementers may get impatient and leap to action too quickly



Implementers annoy others by...

- Being too pushy
- Overselling their ideas
- Readily expressing their frustration when others do not move as quickly

Decisive

Persistent

DETERMINED

Assertive

# Which thinking preference do you most align with?





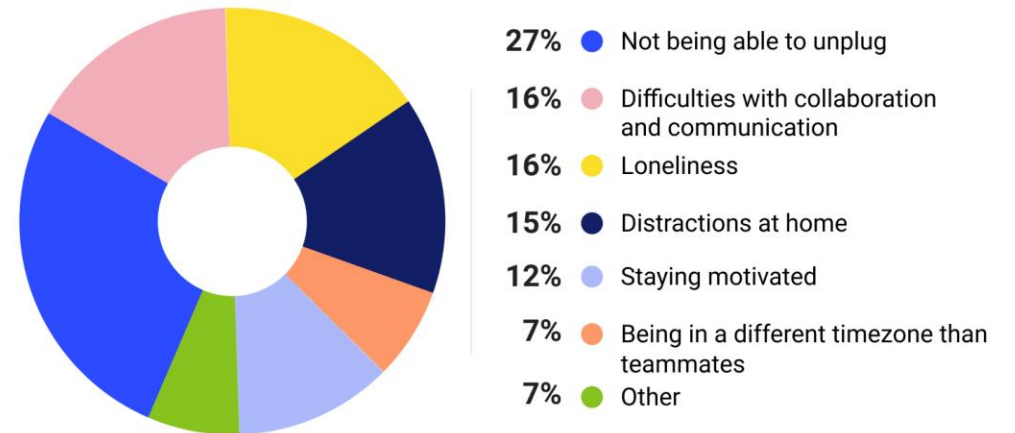
## Why care?

In a 2021 Buffer study on remote work, they found that “difficulties with collaboration and communication” was the second biggest struggle for remote teams.

Research on collaboration shows that teams made up of diverse thinking preferences are more efficient when solving problems.

Great minds don't think alike and the more diverse perspectives on a team the greater the likelihood of success.

### What's your biggest struggle with working remotely?



**2021 State of Remote Work**  
buffer.com/2021-state-of-remote-work



<https://buffer.com/state-of-remote-work/2021>





# How to Use Thinking Preferences

Reflect on your own preferences and strengths

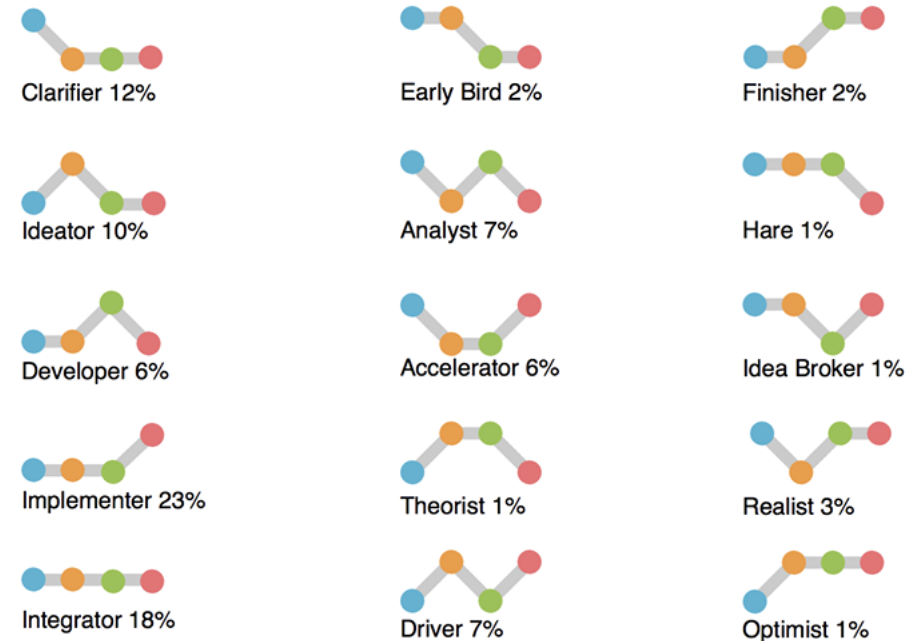
Meet as a team and share your strengths and preferences

Identify team weaknesses and collaboratively devise a strategy to address them

Take preferences into account when assigning responsibilities

How can you use AI to make up for the parts you are lacking?

## Distribution across 15 FourSight Profiles:





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## RACI Model

- R** Responsible for completing a task
- A** Accountable for making sure the task is complete
  - Only one person per task should be accountable for it
- C** Consulted for input and/or feedback
- I** Informed



## Why care?

Provides clarity when working with a team

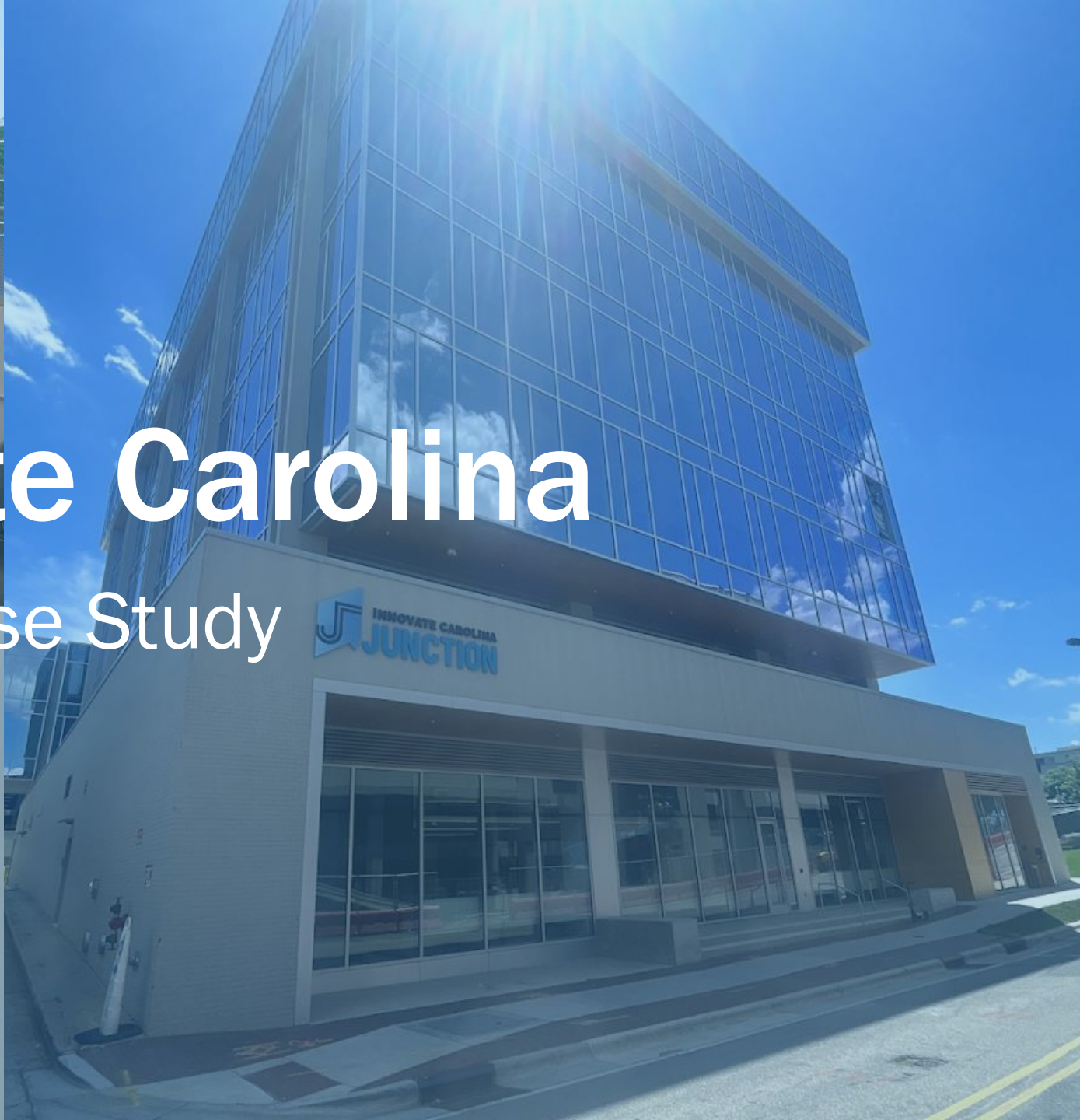
Streamlines decision making

Reduces duplication of effort



Activity	Ann	Ben	Carlos	Dina
Define	<b>A</b>	<b>R</b>	<b>I</b>	<b>I</b>
Design	<b>I</b>	<b>A</b>	<b>R</b>	<b>C</b>
Develop	<b>I</b>	<b>A</b>	<b>R</b>	<b>C</b>





# Innovate Carolina

## Case Study







## Problem

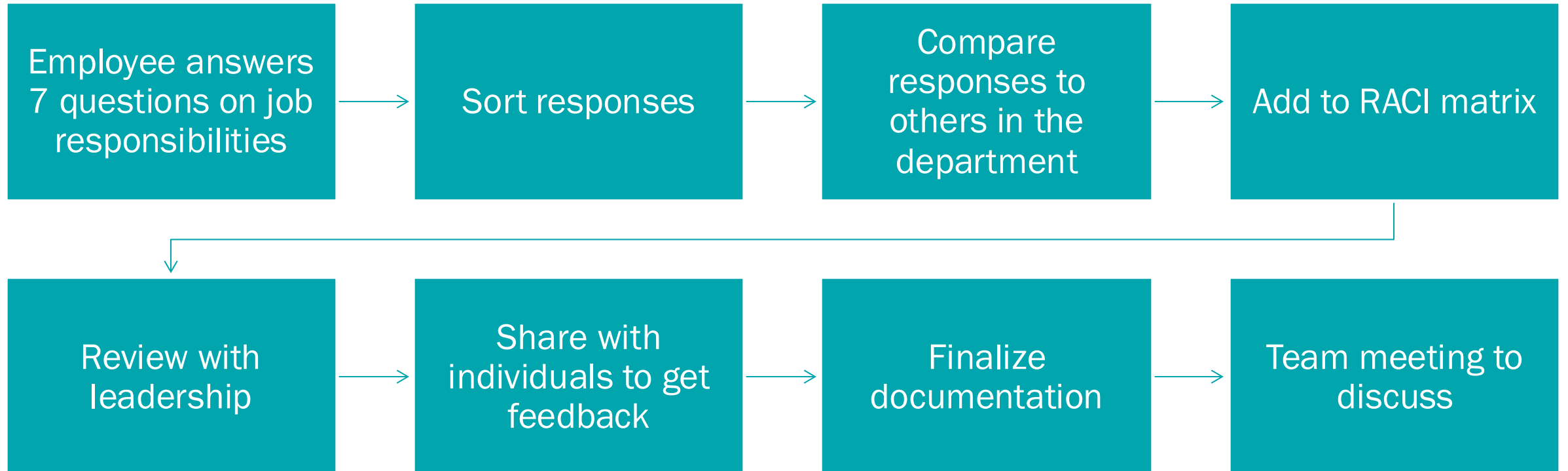
Innovate Carolina was adding a huge new responsibility to the team, opening a business within a University.

The team had also recently lost their manager and started reporting to a new person that wasn't familiar with the team's roles and responsibilities.





# Analysis





# Innovate Carolina Matrix

Category & Subcategory		Running Task List	Director of Economic Development and Innovation Hubs	Marketing Comms Manager	Public Comms Specialist	Marketing & Engagement Manager	Assistant Director of Innovation Hubs	Admin	Student Programming Manager	Director of Data & Partnership Strategy	Data Analyst	Research Analyst	Community Manager	
Junction operational strategy execution	Sales	Tours	C	C	C		C						AR	
		Setting monthly membership and revenue goals	AR											R
	Member Management	Onboarding	C	C	R		R			R	I			AR
		Member experience	C				C			R	I			AR
		Monitoring Junction communication channels								I				AR
		Manage payment collection	I							R				AR
		Offboarding	C	C			C			R	I			AR
	Facility management	Maintain a clean and safe facility	R	R	R	R	R	R	R	R	R	R	R	AR
		Ensuring the facility is properly stocked and organized												AR
		Maintain a strong relationship with property manager												AR
		Manage facility vendor relationships and contracts												AR
		Troubleshooting IT/AV equipment												AR

R – Responsible

A – Accountable (only one person/task)

C – Consulted

I – Informed



# Detailed Team Matrix

Category & Subcategory		Running Task List	Director of Data & Partnership Strategy	Data Analyst	Research Analyst	Data Interns (SILS)	(SILS & other schools)	Business Manager
Recharge offerings strategy execution	Recharge Management	Recharge paperwork	C					AR
	Evaluation	Request evaluation and prioritization	Yearly review of recharge center. Debrief on last year's performance. Collaborate on strategy to shift to charging in areas we aren't currently. What worked, what didn't work. Develop a plan for # of projects, partners in line with our mission, prioritization strategy for requests.	Strategy to shifting reports to be a service	Prioritization of market research projects. Focus on partners involved in programming.			
	Services	Patent research projects	C		Conduct patent and market research using UNC-internal as well as external sources of information. Analyze and synthesize data and produce custom reports in Word, Excel, PPT, and other formats. Deliver final report to client, discuss report findings, and field follow-up questions.			
		Market research projects			Provide ongoing market research consulting to students/student teams across the UNC I&E ecosystem, and ventures/entrepreneurs through Launch Chapel Hill, 79West, and others			
		Database Services	Consulting on data based projects. Hourly rate for database consulting or leveraging current data for specific groups.	Supporting data projects				



## Team Feedback

“I feel SO much better knowing what I am responsible for and what I need to train/hand off to other people. I had the best meeting I’ve had in a while with my interns because I felt so much clearer on what we needed to do. ”

– Public Communications Specialist







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