Step up: In cross-functional teams, are you part of the solution or are you perpetuating the problem?

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Rachel greeted the consultant and took a deep breath before sitting down to be interviewed about "what's going wrong in our product team." She pulled out the checklist she had prepared, so she would remember to tell the consultant about all of the problems that management should put right, to get the team back on track.

"I'm surprised that our executive team hired you instead of pulling the plug on this whole project," she said, with a sigh. "We've wasted far too much time and money running down blind alleys. We have chased too many possibilities that did not work out. I believe we have the talent on this team to make some real breakthroughs. But, if we keep working like this, I don't believe that we're ever going to deliver the goods."

Rachel spoke in a deliberate and respectful voice. Her words were chosen as carefully as the scarf and earrings that accessorized her business suit. She took her work seriously and took pride in being an up-and-coming top-notch scientist who did not let technical problems defeat her. Despite her objective matter-of-fact tone and dispassionate demeanor, anyone could see that Rachel was bothered that her team wasn't making better progress — and was embarrassed about being associated with a project that had been flagged as "needing help."

"The problem isn't a shortage of good ideas or hard work," Rachel said, talking about the deliberations in Product Team meetings. "Everyone here is top-notch. No one is mean-spirited. We have no prima donnas. And we don't stifle anyone's creativity. But I can't help but wonder if we would have been more focused and would have made better progress, if management had asked tougher questions and if they had insisted on hard data and proof before giving the OK to proposals that didn't deliver the goods."

After hearing Rachel's assessment, the interviewer asked permission to challenge her recommendations. "Rachel, you are proposing a different role for top management, to keep the product team focused and to keep subteams from going down blind alleys. As a team member, is there a role you personally can play to vet ideas and only put forward proposals that are robust enough to make real progress — rather than relying on top management to play this role?"

Rachel laughed at the interviewer's naïve question and shook her head. "That kind of due diligence is not my job," she said. "A few times, I tried to challenge ideas. One time, I said that I would not approve a colleague's proposal, if I were in top management. In response, I was pulled aside and told that I had to learn to be a better team player. I was told to trust the experts from other scientific disciplines and defer to people who have more experience and seniority. Even my mentor told me that my performance appraisal would not reflect good things when other team members gave me 360° feedback — unless I went along with the proposals that other team members put forward and trusted that things would work out OK. Are you suggesting that I should have stepped up my criticism and expressed my reservations, even when I was told bluntly to keep my concerns to myself?"

In cross-functional project teams, many technical experts like Rachel feel like they are in a no-win situation. If they challenge specialists from other

disciplines, they are accused of being respectful or obstructionist. If they go about their business and ignore the little voice in their heads that says, "This doesn't make sense to me" or "There's got to be a better path forward," their teams struggle and take too long to achieve mission-critical objectives.

Faced with this dilemma, it's easy to see why it takes courage for smart, motivated, competent team members like Rachel to step up and assert thought-leadership — and challenge their team's consensus rather than "going along to get along" or "living and let live," while well-intentioned but mistaken colleagues career overconfidently into blind alleys.

Courage like this takes force and energy. It requires team members like Rachel to face fears — like the fear of visibility, ridicule, social isolation or retaliation. You could be dead wrong. And, of course, there's the fear that others could reciprocate by challenging your judgment and your scientific conclusions, even when you want to be free to follow your hunches and you aren't ready for criticism.
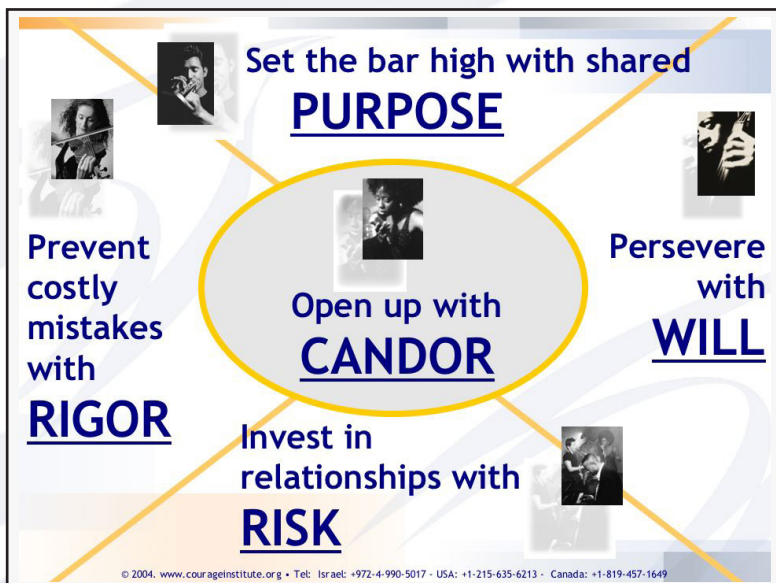
In the face of these fears and others, the courage to step up isn't a matter of throwing caution to the wind or swaggering into team deliberations and throwing your intellectual weight around. Asserting thought-leadership in a clumsy or thoughtless way might be cathartic, but it is not likely to ennoble sceptical or reluctant colleagues to engage in a productive dialogue and lift their thinking and problem-solving to a higher level.

In our work preparing technical experts like Rachel to assert thought-leadership in a way that ennobles the team to accelerate their progress rather than enabling them to stay complacent or disabling healthy dialogue, we provide a proven, 5-step formula — built on the 5 Courage Factors — to assert thought-leadership, voice

concerns, and challenge their colleagues' proposals in a way that brings the team together rather than driving factions farther apart. The 5 steps in this 5 Courage Factor formula are...

1. Candor. Ennobling thought-leaders show a sincere desire to help and make others look good, rather than a desire to assign blame or a desire to impress others by showing how much power they have or how much they know. After doing a "gut check" of their positive intentions, ennobling thought-leaders, ennobling thought-leaders stay conscious of their voice tone, body language and then words they choose to open the conversation, especially if they are challenging teammates from diverse cultures.

Set the bar high with shared **PURPOSE**

Open up with **CANDOR**

Prevent costly mistakes with **RIGOR**

Persevere with **WILL**

Invest in relationships with **RISK**

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2. Purpose. Ennobling thought-leaders affirm mission-critical benefits, so teammates can see how the challenge can take the team forward, even if it requires a temporary "time out" for reflection or reassessment. They show that they are striving for "win-win-win" solutions — that will benefit both parties and will also contribute to enterprise-success. They show that they understand business conditions and social or ethical imperatives. They define criteria of success so proposals can be evaluated against the right metrics.

3. Will. Ennobling thought-leaders look forward rather than backward. They focus on "how we can make things better" or "how we can accelerate our progress" rather than "what went wrong" or "who is to blame." They ask "Why not?" rather than, "Why?" They turn to colleagues and say, "Here is what we need from you," rather than "Stop doing what you are doing, because it is not helpful." They exhibit a can-do attitude. Their enthusiasm and confidence are infectious.

4. Rigor. Ennobling thought-leaders don't end team deliberations with good intentions and vague assurances that a critical mass "gets it." They make sure the specifics are settled, with agreements about who will do what by when — and how progress will be assessed, with sufficient time to make adjustments and course corrections. They keep learning from experience and help one another incorporate new techniques and best practices — including those that were "not invented here."

5. Risk. Ennobling thought-leaders earn trust by continuing to function as part of a team after the meeting or teleconference ends and after they go their separate ways. They keep colleagues on belay and staying conscious of the way that their actions and on-the-fly decisions affect those who work upstream, downstream or in parallel. They give benefit of the doubt and offer to help if problems or setbacks surface. They reach out and pull through additional support that is needed. If they disagree with team decisions or action plans, they are transparent about their reservations — and about how they will use the meeting after the meeting to take unresolved issues off-line — rather than surprising teammates with poor execution.

Learning to assert thought-leadership with the 5 Courage Factors — in a way that ennobles other team members to take advice on board and learn or invent new practices even when it is easier to "do what we have always done and hope that the results will be different" — requires a paradigm change for many technical and scientific experts like Rachel. All too often, we confuse harmony with progress — and assume that conflict is a sign that things are dysfunctional rather than making the kitchen messy so we can cook up something that will turn out to be tasty.

Consultants who ask team members for an assessment of "what is going right and what needs fixing" may need to challenge assumptions that are ill-suited to the dynamics of flat, cross-functional, molecular or matrix organizational structures.

The most common misconceptions — which, left unchallenged, can actually discourage competent, motivated, good-hearted team players like Rachel

from stepping up when their teams could benefit from a dose of ennobling — are...

False assumption #1. Ennobling is management's job, not my job. Rachel's first mistake was assuming that management knew what to ask, in order to vet and approve proposals. Instead, Rachel was hired because her manager believed she was smarter and more expert — and brought know-know and talent that went beyond her manager's grasp of the field. In well-managed organizations, leaders hire people with more know-how than they possess. But if those who are smarter and more expert act as if their managers know more and see more, and look for validation rather than accepting the fact that they will see things and catch things that those with less expertise will miss, teams fail to reap the benefits of a higher level of expertise.

False assumption #2. I'm the person with the PhD in this field. Others should listen to and defer to me. Listen, yes. But defer? Get real! Those who would threaten Rachel by giving her poor ratings on 360° feedback have a distorted view of what effective team play is all about. If technical or scientific problems are complex enough to require cross-functional collaboration, knowledge-sharing and problem-solving, PhD's in one field need to be challenged to integrate their specialized know-how with other perspectives. Who writes the most elegant computer code is less important than whether the integrated system works reliably and accomplishes what it should. Who does the most innovative assay is less important than whether we know enough about pharmacokinetics to design the best possible molecule for a specific unmet medical need.

False assumption #3. I am OK because I am loaded for bear and ready to sell my ideas. If we are open to a dialogue with thought-leaders in other disciplines, we are open to the fact that ideas morph, change and evolve as they are reviewed and discussed. Success is not "winning over" tough critics — or preserving your time on the team's meeting agenda. It's being open to the creative process, even when the outcome is different from the one that you anticipated and pre-planned.

False assumption #4. After a healthy debate, we are OK if we find a win-win solution. So, if you are looking out for your interests and Rachel, as your antagonist, is looking out for her interests, who is looking out for

the fiduciary interests of the enterprise — or social or ethical benefits that have to be preserved? Start by defining purpose — and end by making sure that your agreements are more than political expediency or a compromise that doesn't take your team where it needs to go.

False assumption #5. Teams should be a "safe place" for innovative thinking and fresh ideas. Sure, there is a time for brainstorming — when teams need to do "blue sky thinking," to identify options that go beyond conventional or easy solutions. But, in a business environment where resources are limited, where there is little margin for error and timelines are aggressive, we need the capacity to be tough on ideas and to be tough on the people who put forth ideas, without being tough on their spirit or initiative. In many technical teams, as Rachel noted, we don't see a shortage of ideas. Instead, we see a lack of will to kill ideas that make people busy and that impose premature deadlines and activity on people, without giving the team traction and focusing on the few good ideas that can truly take them forward.

False assumption #6. I said it. I cannot help it if they do not want to listen. Some people adopt new ideas and embrace challenges earlier than others. Some people have more cognitive flexibility than others. Some people "get it" sooner than others. When we do team problem-solving activities, thought-leaders (who can see the solution first) are often amazed at how hard they have to work to mobilize enough support and transfer ideas into action, from potential to kinetic energy. If you have a Rachel on your team, tell her not to give up. It may take more than a single conversation to get others to see the logic of your thinking — or to put that logic to work, instead of reverting to the conventional option.

False assumption #7: I told them so. If only they had listened. The most heartbreaking team failures are not those where problems surfaced that no one could anticipate and that took the team by surprise. The most heartbreaking team failures or setbacks are the ones that were foreseen by thought-leaders who were unable to mobilize others to take seriously. Being technically right is far easier than getting others to take your concerns and recommendations to heart. When your ideas are discounted and you are blown off, it is easy to see yourself as a victim of team members who don't want to listen. That is particularly true if you are a member of a gender group, national or ethnic group or professional group that is treated with a "one-down" social status. But you need not continue to be a victim, if you learn how to step up and assert thought-leadership with courage.

Dr Merom Klein is the principal architect of The Courage Institute's team mobilization methodology for leadership development and co-author of the book, The Courage to Act, which describes the research and thinking behind the 5 Courage Factors in a way that is accessible and pragmatic for executives in biotech companies. Merom has over 25 years of experience designing and conducting leadership development programs for clients like Merck, Johnson & Johnson, Pfizer, CIGNA Healthcare, Aetna, ARAMARK, PowderJect, Rafa"el, GE Healthcare, ArQule and Infinity. Merom earned his PhD at Temple University, with a speciality in organization development and leadership. You can reach Merom at merom.klein@courageinstitute.org and learn more about The Courage Institute at www.courageinstitute.org

Dr Louise (Yochee) Klein is director of The Courage Institute's executive coaching practice. Louise has personally coached thousands of executives at various levels to bounce back after they have hit the wall and embrace new leadership challenges with a higher level of courage — and has equipped internal HR partners and a cadre of external coaches to function as courage mentors. Her clients have included executives at ITI, Janssen OrthMcNeil, PrediX, Millennium, GE Financial Services, Methodist Hospital, Solvay and Quintiles. Louise earned her PsyD at Widener University, with a speciality in clinical psychology. You can reach Louise at louise.klein@courageinstitute.org and learn more about The Courage Institute at www.courageinstitute.org

Ennobling conversations™

How to step up & assert thought-leadership

It takes courage to challenge the status-quo and raise issues that take your team beyond what feels safe, secure or politically correct. Just because you are a technical expert with an impressive track record, there is no guarantee that your input will be accepted. It takes courage to engage in a healthy debate, rather than looking for acquiescence or a quick consensus.

Ennobling leaders know how to get teammates to listen and take their input seriously, even when they raise issues others would prefer to ignore. They may not win every debate but they know how to get teammates to face conflicts, find better solutions, take new standards to heart, execute new strategies and overcome technical obstacles. That's the point of...
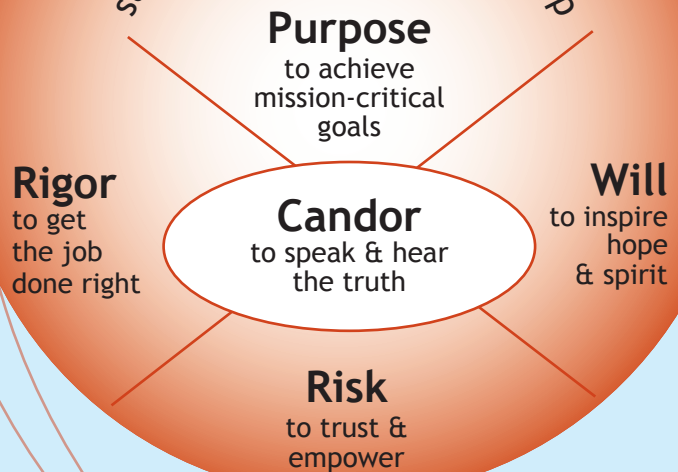
Ennobling conversations™

A 2-day learning/practice laboratory that will equip technical thought-leaders in your organization to...

- Prepare for moments of truth that create conflict and ambiguity — so you are equipped to step up and take charge instead of being caught off-guard or taken by surprise
- Sharpen your diagnostic skills — to understand partners who may be reluctant to take your counsel to heart
- Deal with fear or avoidance by ennobling reluctant partners and lifting them to a higher level than the one they would choose for themselves
- Approach performance improvements and ethical dilemmas with appreciative inquiry — so partners know that you value their talents and respect their authority
- Challenge teammates to lift their game and contribute even more to enterprise success
- Respond to fear and reluctance — to deal with direct objections and overcome passive resistance
- Open genuine dialogue to bridge differences — so "doing right" is more important than the politics of "who is right"
- Renew your confidence when you face scrutiny from partners who don't yet trust your judgment or accept your recommendations
- Build initiative and a sense of urgency, even when others wish to trivialize risk factors or overlook improvement opportunities
- Use humor, a light touch and empathy so teammates take issues seriously without taking themselves too seriously
- Leave you with pragmatic, concrete strategies to lift team performance — from the top-down, bottom-up and outside-in
- Do all of this in a spirit that is positive, upbeat, future-focused — and builds confidence to step up and assert thought-leadership

The 5 Courage Factors

A proven formula for technical experts to step up & assert thought-leadership

Purpose
to achieve mission-critical goals

Rigor
to get the job done right

Candor
to speak & hear the truth

Will
to inspire hope & spirit

Risk
to trust & empower

According to one executive sponsor...
"*This workshop was exactly the right balance between fun activity and practical business-focused deliberations.*"

Ennobling conversations™

How to step up & assert thought-leadership

Agenda

Based on the thought-leadership that others need from your group of technical experts — and the business imperatives that you can achieve by stepping up to address technical obstacles, ethical dilemmas or improvement opportunities — we will customize a program for your group. The typical agenda includes:

Pre-work

- Chart the business imperatives and contributions needed from technical experts
- GroupMind Express® online idea exchange and online action planning forums — to identify moments of truth when asserting thought-leadership and dealing with fear or reluctance can contribute most to enterprise success
- Courage Index™ to map the readiness or reluctance of stakeholders to embrace recommendations and address issues flagged by your group of thought-leaders
- Pre-reading on case studies

Day 1: Making your voice heard: Case studies & practice activities

- How early and late adopters resonate to the new ideas you put forward as thought-leaders
- Helium pole problem-solving activity: Make your voice heard with the 5 Courage Factors
- Looking across your organization and partnership web to build a molecular support network
- Case study: How King Sejong the Great relied on thought-leaders to galvanize support
- Diagnosing readiness: 6 steps from denial to competent execution
- Practice using higher-level influence tactics to ennoble & raise your followers' courage
- The art of constructive confrontation: Intervention techniques to address blame & denial
- Budget to Build activity: Ennobling others to surrender control and trust your judgment
- Courage Index™ feedback from stakeholders

Day 2: Ennobling partners to participate & engage: Your action plan

- Appreciative inquiry: Using constructive impatience and encouraging confrontation in a way that telegraphs respect, empathy and belief in your partner's potential
- Ennobling diverse interests, personalities and cultures
- Lessons from The Challenger Disaster: As a technical thought-leader or risk analyst, how you can anticipate and harness the interests of the stakeholders you need to mobilize
- Skill practice: Address the concerns and vulnerabilities that would make them reluctant to embrace your recommendations
- Structures and facilitation tools to deal with hierarchy gaps and candor-limiting dynamics
- Victim-of-circumstance vs take-charge perspectives when you encounter opposition
- Putting it all together — with a concete action plan to reach out and ennoble early and late adopters with...
    - √ Candor — starting with appreciation and respect, rather than an adversarial position
    - √ Purpose — explicitly agreeing on mission-critical imperatives and common interests
    - √ Will — to boost confidence and raise enthusiasm to engage rather than avoid
    - √ Rigor — defining roles, decisions, co-ordination mechanisms and room for improvisation
    - √ Risk — by trusting teammates to do their part, pull through and make things happen

Follow-up, pull-through & execution

- GroupMind Express® online idea exchange and online action planning
- Contract with sponsors for air cover to enhance performance & accelerate timelines — and contract with molecular teams for shared accountability and common purpose
- Convene/use forums to solicit support and obtain feedback/intelligence from early adopters
- Ennoble late adopters to face new challenges and embrace recommendations — and partner for enhanced performance, regulatory compliance or accelerated timelines

About The Courage Institute International

Ennobling Conversations™ and our other systems have been tested and proven effective with nearly 30 years of experience lifting performance in knowledge-based ventures including pharmaceuticals, bio-tech, computer software and hardware and defense.   We customise our programs to fit each client's unique business imperatives. As a result, you can expect a program that is tailored to fit your situation — and leverage your time and budget.

We are known for action-learning programs that are energizing and interactive, producing performance gains that transfer directly from the workshop to the workplace. Ennobling Conversations™ has equipped advisors in engineering, safety, QA, marketing, HR, supply chain management, project management and other disciplines to accelerate timelines and direcly boost organizational performance.

Our founder, Dr Merom Klein, wrote the book about courage, change and ennobling diverse teammates in matrix organizational structures. The Courage to Act, published by Davies-Black in North America, describes the 5 inner strengths (candor, purpose, will, rigor and risk) that leaders need to imbue in diverse teams, so they are equipped to take full advantage of different perspectives and different knowledge bases, and succeed when the going gets tough.

Ennobling Conversations™ and other Courage Institute programs have been used by clients like GE, ARAMARK, SK, Solvay, EPIX, Merck, Sanofi-Aventis, Millennium, Medgenics, GSK, Johnson & Johnson, Regence, Aetna, NASA, Intel, Health Canada, Banque Paribas, ITI, Norsk Hydro, Sunkyong and Rafa"el.

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