

# 2016 Team Leader Training

Step by step process

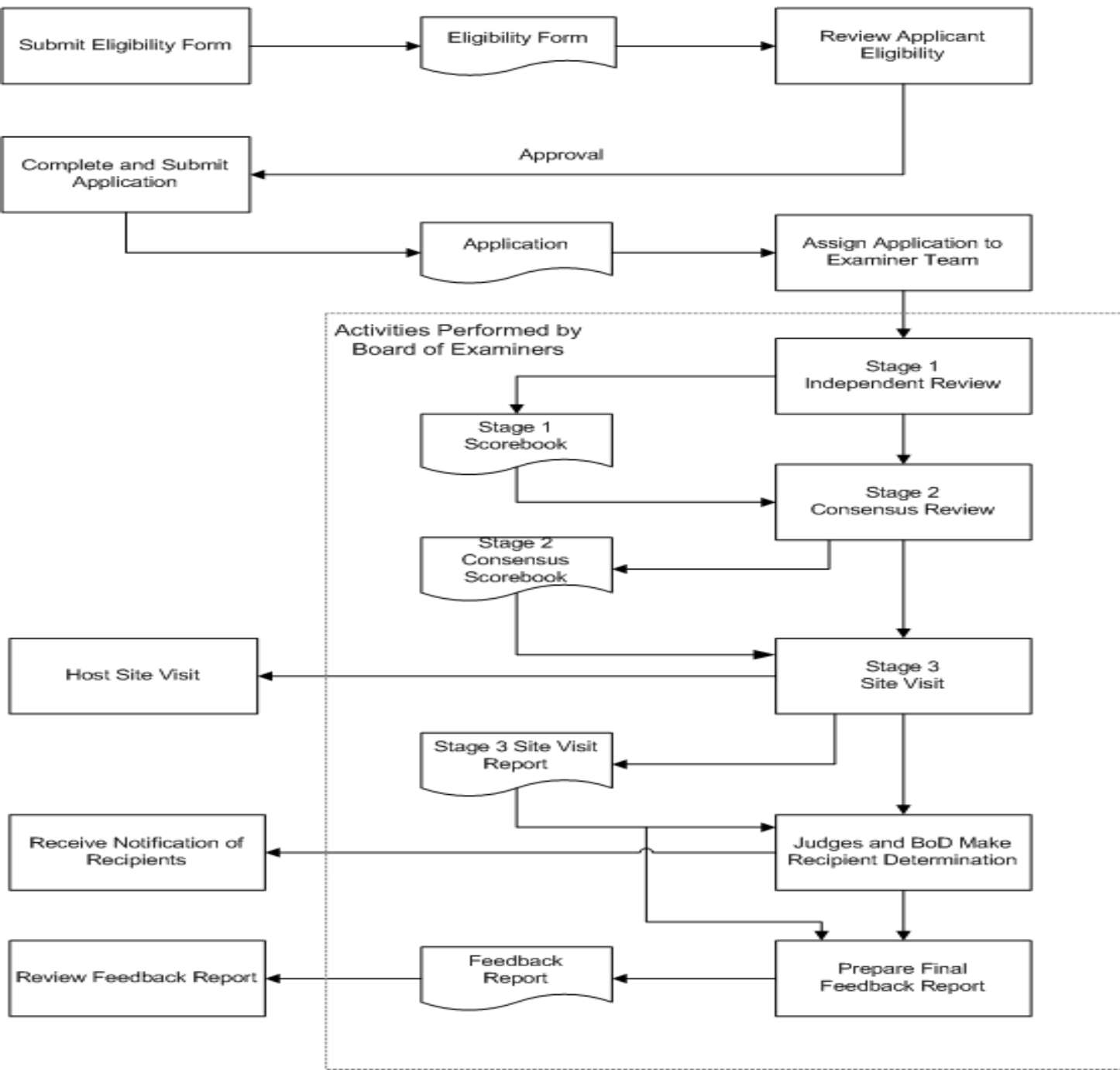


# Preparation

- TLs must understand they must know they are in charge.
- BUTL are to work with the TL and fill in as necessary. Assist Examiners with their Category/Items
- Feedback Writer is the primary editor for the team
- Process Coach is responsible to follow processes as outlined in the Team Leader Process Manual and the Application Timeline sent from the QTF CEO.
- Examiners are responsible to give the applicant the best possible comments and meet time commitments established by the Team Leader.
- All must adhere to QTF Code of Ethics.
- All must ensure there are no conflict of interest.

# Applicant

# Quality Texas



# Stage 1 Independent Review

Verify Independence First  
No conflict of interest  
QTF will send a Team Calendar

# Stage 1 - Independent Review (IR)

- Team Leader Customers in Stage 1 - IR
  - Other team members - Respond to questions; communicate with BUTLs about team strengths/weaknesses.
  - BUTLs - Support them with clear guidance/processes.
  - Feedback writer - Make sure to write comments well; make information clear.
  - Panel of Judges - Make sure information is clear and logical.
  - QTF - Support the process to assist the Applicant in moving to the next level.
  - Applicant - The ultimate end user of the feedback report (product).

## Stage 1 - IR 15 Steps (1-3)

- 1. Study the application - be the expert; look for initial key themes; address team questions/concerns; introductory emails; remember they (team members are volunteers)
- 2. ID Key Factors - These are critical pieces of information about the applicant; provide a consolidated list in SN for team
- 3. Compare application to Criteria/Framework - becoming the expert



# Stage 1 - IR 15 Steps (4-6)



- 4. ID potential comments for process items - pay particular attention to s's/ofi's; bolded comments; learning and integration
- 5. Determine scoring ranges for process items - Judges review team's Stage 1 scores for some calibration
- 6. Select the 4-6 comments to write as you lead the way with the application and set the standard

## Stage 1 - IR 15 Steps (7-9)

- 7. Write comments for the process items - take care to evaluate other comments from the team after you have written your comments
- 8. Score the categories/items - take care to evaluate appropriately and review the scores of other examiners after scoring
- 9. ID potential comments for results items - pay attention to comparisons, linkages, gaps, and segmentation; work with new examiners to focus on KF





## Stage 1 - IR 15 Steps (10-12)

- 10. Determine scoring ranges for results items - Judges review team's Stage 1 scores for some calibration
- 11. Select comments for results items - remember you lead the way
- 12. Write comments for results items - take care to evaluate other comments from the team after you have written your comments



## Stage 1 - IR 15 Steps (13-15)

**Score!**



- 13. Score results items - take care to evaluate appropriately and review the scores of other examiners after scoring
- 14. ID and write some initial key themes - try to assess what they might be and ask more experienced examiners to do the same especially backup team leaders
- 15. Compile scores - Judges look at team leader scores more closely than other examiners

Questions, Comments,  
Thoughts?

# Stage 2 Consensus Review (CR)

Putting Teamwork Together

## Stage 2 CR 16 Steps (1-3)

- 1. Ensure All Scorebooks Stage 1 Independent Review Are Posted on Scorebook Navigator; if examiners have not completed then contact QTF for guidance
- 2. Send Introductory E-mail to the Team - set date for pre-consensus call (1-2 hours max) and consensus call date (4-8 hrs) over three days
- 3. Schedule Pre-Consensus Call and Send Next E-mail to the Team - date/time for calls; contact QTF for those in non-compliance



## Stage 2 CR 16 Steps (4-6)



- 4. Select Item Assignments for the Team - Check with QTF if you need help with assignments; consider education, experience, and preferences of the examiners
- 5. Develop Agenda for Pre-Consensus Call
- 6. Review Key Factors with Team if needed

## Stage 2 CR 16 Steps (7-9)

- 7. Conduct Pre-Consensus Call - be positive; have agenda; assign person to time the meeting (PC or BUTL); be flexible with new examiners; hear everyone
- 8. Lead Team through Comment Synthesis Process - send email weekly with information if possible at the same time each week
- 9. Lead Team through Rescoring Process - leaving stage 1; double check score against guidelines; do not heavily influence others



## Stage 2 CR 16 Steps (10-12)

- 10. Lead Team through Site Visit Issue (SVI) Writing Process - minimize site visit issues per Category; be judicious about asking for copies from applicant
- 11. Lead Team through Comment Process - well-prepared teams can complete consensus in 4-5 hrs
- 12. Lead Team through Back-up Consensus Process - have teams copy you at cc for all emails; track them for deadlines; followup if the Champions and Backups appear to be behind





## Stage 2 CR 16 Steps (13-16)

- 13. Prepare for the Consensus Meeting - have the team script their item presentations and practice
- 14. Lead the Consensus Meeting - everyone must be on the phone; review agenda; look for potential key themes; use breaks when needed; use scoring guidelines to consense on scoring; take break and talk offline if you have to do that; thank the team for their hard work
- 15. Lead Team through Revision of Item Comments - monitor email traffic and SN entries
- 16. Finalize Consensus Scorebook with Feedback Writer - work together to add clarity to scorebook; post to SN; do not destroy until told to do so by QTF
- IF NO SITE VISIT - The team is finished when told so by QTF

Questions, Comments,  
Thoughts?

# Stage 3 - Site Visit Review

May be some new or changing  
team members at this point

# Stage 3 Site Visit 28 Steps (1-4)

- **1. Develop Agenda for Onsite Strategy Development and Team Preparation**  
Work Days - finalize all SVI worksheets; develop an interview strategy and list of interviewees; go over opening agenda;
- **2. Contact the Applicant** - talk to POC about organization expectations; request Category 7 updates; develop snack lists and dinner options; (may be assigned to a BUTL); ID dress code, hotel, and logistics
- **3. Conduct the Pre-Site Visit Meeting at the Hotel** - normally Sunday at 1:00PM; get in bed around 10PM; get good sleep in order to do you best; finalize all SVI worksheets and walkaround questions
- **4. Conduct the Introductory On-site Meeting** - slides provided by QTF and adapted to organization

## Stage 3 Site Visit 28 Steps (5-8)

- 5. Conduct the Executive Meeting - full team and top leaders from applicant; prepare team to have a few questions and take comprehensive notes
- 6. Start the Assessment Process with the Two-Person Sub-teams - remind team that one person will routinely ask the questions and the other will take notes; use caucus room provided by applicant to debrief about team findings across Categories
- 7. Conduct the Evening Caucus - round robin debrief about what each examiner found during the day and what questions remain; send team to rooms <10PM
- 8. Learn From Site Visit Issues (SVI's) - share SVI learnings from the day; review what SVIs are outstanding or new ones developed; be careful with new ones

## Stage 3 Site Visit 28 Steps (9-14)

- 9. Ensure Document Return - catalog documents from the applicant
- 10. Conduct the On-site Closing Meeting - receive presentation from QTF; TL may address questions about process but that is all
- 11. Identify Potential Comments - that will help the applicant become better
- 12. Determine the Scoring Range - based upon comments after site visit
- 13. Select Comments to Revise or Write by Category  
Champions/Back Ups - 4-6 most important
- 14. Revise or Write Comments with Input from all Team Members - much like step 13 but with more input from others this time

## Stage 3 Site Visit 28 Steps (15-20)

- 15. Rescore Items
- 16. Perform Consensus on Comments and Scoring
- 17. Write Comments From Consensus Comments - Remember NERD; eliminate “it is not clear” or “it is not apparent” because definitive statements are needed now; look for embedded strengths/OFIs of conflicting comments across categories/iteme
- 18. Final Team Consensus on Comments and Scoring
- 19. Finalize Key Themes
- 20. Finalize the Scorebook

## Stage 3 Site Visit 28 Steps (21-24)

- 21. Prepare Departure of the Team - ensure all comments are uploaded into SN; TL, BUTL, FBW, and PC have a copy of the final Site Visit Report/Stage 3 Scorebook; do not destroy until after the Judges Meeting in March and given instructions by QTF; thank team
- 22. Close the Site Visit Work at the Hotel - Deliver the final report to the QTF ([drmac@quality-texas.org](mailto:drmac@quality-texas.org)).
- 23. Meeting (phone call) with the Panel of Judges
- 24. Complete Post Judges Call Revisions



## Stage 3 Site Visit 28 Steps (25-28)

- 25. Review Judge/QTF Recommendations
- 26. Finalize Report after Judge/QTF Recommendations - final edit by QTF and submission of final feedback report to applicant
- 27. Shred Documents
- 28. Complete Surveys and Attend Awards Banquet

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Thoughts?